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Strategic Directions for Culture and Heritage Tourism in British Columbia

Prepared for:

Ministry of Small Business, Tourism and Culture
and
Tourism British Columbia

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TOURISM BRITISH COLUMBIA
CANADA

BRITISH COLUMBIA

EXECUTIVE SUMMARY

Introduction

The purpose of this project is to work toward the development of a culture and heritage tourism strategy for British Columbia. This report provides an overview of existing product and market information and develops a series of strategic directions and options for further review by the Government, Tourism BC and stakeholders.

Cultural tourism became recognised as an important component of international tourism in the early 1980's. The World Tourism Organisation defined cultural tourism as "covering all aspects of travel whereby people learn about each other's way of life and thought."

In its broadest definition, cultural tourism can be interpreted to include almost all tourism activity. In addition to the more commonly-accepted definition that includes both arts and heritage, cultural tourism can also include:

- Natural history – experiencing the flora and fauna of a region.
- Ecotourism – a range of adventure, nature-based vacation experiences.
- Sport tourism – vacations which include participation or viewing of sport.
- Agri-tourism – vacations to experience agricultural life and products.
- Cuisine tourism - vacations which focus on experiencing the gastronomic delights of a region.
- Aboriginal tourism – trips which include visits to authentic aboriginal tourism sites or experiences.
- Industrial tourism – vacations which include experiencing the industrial heritage of a region at sites or in museums.

The definition of cultural tourism used in this Report is more restrictive as it is based on participation in arts and heritage activities. This report will follow the approach used in the recent Canadian Tourism Commission (CTC) report, Packaging the Potential, in order to provide consistency and continuity with any actions taken at the national level by the CTC or the Department of Heritage.

This report will be specifically concerned with aspects of culture and heritage that create tourist products:

- The Performing Arts (Theatre, Dance, Music)
- Visual Arts and Crafts
- Museums and Cultural Centres
- Historic Sites, Villages and Interpretative Centres
- Festivals

It is recognised that these limitations exclude some types of culture and heritage tourism. Social, natural and even industrial heritage are legitimate expressions of heritage. But as the approach is widened to include these. there is an element of risk in widening the concept too far and encroaching on other types of tourism such as ecotourism, demonstration forests or winery tours that are commonly thought of as existing within different classifications. As work progresses on the development of the above sectors, the relationship to those sectors not included in this report should also evolve.

Aboriginal tourism has not been analyzed in detail in this report as it is of sufficient importance to warrant its own development process. Tourism BC has been working to assist in the development of this sector with Aboriginal Tourism BC (AtBC). The focus of AtBC is on Aboriginal ownership and economic issues within the broadest definition of tourism.

The Cultural Tourism Product

Information is presented on the typology and supply of cultural tourism resources in BC. In total, approximately 1,250 cultural and heritage organizations, events and facilities were identified from a range of sources. The intent of this section is not to present a comprehensive listing of all cultural and heritage resources in the Province. Rather, it is intended to serve as a starting point for further work and in particular to identify a classification system. Three main categories have been identified:

Heritage and Historic assets comprise almost two-thirds (58%) of all the province's cultural tourism resources. Within this category, a combination of museums (53%), built heritage resources (41%), and related heritage activity-based resources (6%) comprise the heritage-historic cultural tourism portfolio.

Distinct subsets of heritage and historic resources are found within each of these cultural tourism groupings. For instance, the largest proportions of museums are primarily art-related facilities (48%), or community-based museums (41%). Similarly, the mix of heritage resources is quite diverse. Here, the heaviest concentrations of built heritage tourism resources are linked to historic sites (84%) and cultural interpretative centres (13%). Activity-based heritage resources are primarily (94%) associated with interpretative programs.

Festivals comprise another quarter (24%) of BC's promoted cultural tourism attractions. Within this category, *community / heritage* (51%), as well as performing and *visual art* events (37%) make up the lion's share of the festivals that are promoted as tourism attractions.

Performing and Visual Arts resources comprise the remaining 18% of the province's currently promoted cultural tourism portfolio.

Within this category, *visual arts* represent about two-thirds (68%) of the resource base. The largest proportions of this activity are associated with craft/art exhibition/studio displays (43%), and craft/art fairs (41%). The lion's share (72%) of those performing arts events promoted to tourism markets is associated with theatre and dance activities.

The Market for Cultural Tourism

Information is presented on the characteristics of Canada and BC's cultural tourism markets. This is done by examining existing data bases that contain traveller and trip behaviour information concerning persons with a stated predisposition to participate in culturally based tourism activities.

For the purposes of this report, only those travel databases that were readily accessible, relatively fresh (post 1994), and that represented key BC travel markets were examined. Information derived from travel market studies in the United States, Japan, U.K., Germany, Canada, and BC was investigated. Wherever possible, potential cultural tourists were defined as those individuals who had indicated that participating in pursuits which were primarily cultural in nature was somewhat or very important to them when travelling. Where feasible, existing cultural travellers were designated to be those individuals who had participated in pursuits or activities which were indisputably cultural in character (e.g., visiting museums and historic sites, attending performing arts, frequenting art galleries etc.), or had a strong cultural component associated with them (e.g., visiting local craft shops events, festivals etc.).

U.S. Travel Industry Association data suggests that about 1/3 of all U.S. adults (65.9 million persons) reported taking an historic and/or cultural trip in 1996 (TIA, 1997). About half (50%) of these travellers took part in at least one trip with an "historic" component. Historic trips were defined as those involving visits to historic places and museums. Of the trips generated by "historic" travellers (53.6 million trips) about 19% were primarily prompted by interest in seeing historic places or museums. Another 44% of these trips had similar factors as secondary reasons driving their occurrence.

The other half of the U.S. historic/cultural market was interested in other cultural features in their travel. Approximately, 37% (12.3 million) of these "cultural" travellers claimed that interest in attending a cultural event or festival had been the primary motivation for their trip. Another 34% of them felt that these cultural opportunities were secondary but still important motivators in their decisions to travel.

Of the three international long haul travel markets examined for this report, Japanese travellers appear to provide the largest market of potential cultural tourists for Canada.

Based on 1995 population estimates and the stated preferences of respondents in each of the market surveys, the potential for attracting Japanese "cultural interest" pleasure travellers to Canada exceeded 4.9 million visitors for the period 1995 to 2000. United Kingdom and German estimates for the period 1996-2001, ranged from about 2.4 million for U.K. travellers to 1.7 million visitors for German visitors.

Interest in cultural tourism pursuits among BC's international markets compares favourably with interest levels associated with outdoors, golf and alpine skiing experiences.

General interest in cultural tourism ranks second only to outdoor activity interest levels amongst Japanese, United Kingdom and German travellers. The size of the interest level gap between these two types of pursuits is least pronounced in the Japanese market, where interest levels in cultural pursuits (45.%) approximate those levels associated with outdoor pursuits (47%).

Cultural travellers in The BC Non-Resident Visitors Study were defined as those respondents who indicated that "visiting historic sites or areas or visiting attractions such as museums, art galleries, zoos, etc" were somewhat or very important to them or their household when choosing to take their trip to BC. Using this operational definition, it was apparent that half (51%) of the travellers to BC claimed to have an interest in culturally based travel. Their travel represented about 6.1million potential trips generated by this group. Furthermore, about seven tenths (71%) of these travellers intended to travel within BC again within two years of their interview.

A review of data from new analysis of the BC Resident Study undertaken in 1997 suggests that considerable demand for cultural tourism exists among B.C. residents. About a quarter (27.6%) of all BC resident respondents placed importance on experiencing cultural attractions or events during their travel. This represented an estimated a combined 4.4 million day and overnight trips by these respondents. In addition, the intentions amongst these cultural travellers to take their future trips in BC were high. Cultural tourists indicated that about nine-tenths (91%) of these trips were scheduled for destinations in BC in the two years following the study.

The analysis clearly identifies that market opportunities exist in BC for the development of innovative and authentic cultural tourism experiences. Significant portions of all of the province's major geographic markets place importance on being able to experience various forms of culture during their travels.

Strategic Directions

- The following strategic directions are intended to serve as the basis for discussion concerning the development of marketing and product development strategies.

Organizations

- The tourism industry, and Tourism BC, will need to develop a vision for tourism in BC which includes the culture and heritage resources required to contribute to the strength and diversity of the provincial tourism industry.
- The heritage sector will need to move beyond their mandate to preserve, exhibit and educate to consider how they can offer authentic experiences that entertain and inform visitors.
- Culture and heritage organizations that have the desire and capability to participate in tourism will need to ensure that the quality of their product and their management resources have the capability to meet the needs of tourists and they are able to work with the tourism industry.
- Market-ready organizations can form their own "network" to assist in developing co-operative marketing opportunities both regionally and provincially.
- The development of arts/culture/heritage and tourism organizations in Vancouver, Victoria and Kelowna can serve as models for community organisation development in other urban and rural regions.
- The Cultural and Heritage Tourism Sub-Committee of the CTC will be developing national strategies and BC should play an active role in this process.

Product Development

- The identification of 'market-ready' organizations, sites and facilities is critical to the success of culture and heritage tourism.
- The number of market-ready BC cultural and heritage resources will need to be increased in order to meet present market demand.
- A mechanism needs to be identified which encourages the tourism industry to financially participate in the development of market-ready culture and heritage products in order to increase the size of the market for BC.
- Those organizations that are near market-ready need assistance to get their product ready to market.
- A "Made in BC" program for art, crafts and handiwork should be examined for the feasibility to register BC artists and artisans, affix labels to products, develop point of sale materials and promote the program generically.
- Festivals and events representing all of the different culture and heritage classifications represent an opportunity to develop new culture and heritage tourism products.

- "Blockbuster" (or hallmark) events can serve as the foundation for building culture and heritage tourism both provincially and regionally.
- There are at least two possible approaches to the development of regional themes based on either routes or trails or on authentic regional experiences.
- The federal and provincial heritage sites and museums in BC can serve as "nodes" for development that can anchor regional groupings or trails.
- Information contained in this report, the CTC Packaging the Potential report and reports and plans prepared by other communities in the Province could be packaged or assembled to provide some initial resource material to communities.

Marketing

- Short-term marketing strategies should focus on ensuring that current visitors to BC have the opportunity to purchase the cultural and heritage product.
- In the longer term, marketing strategies should change to attract new visitors to the province who are interested in culture and heritage.
- Generally, market-ready cultural organizations need assistance to develop their marketing plans and find the resources necessary to implement marketing activities in co-operation with the tourism industry.
- While some new market research is provided in this report, additional research is required to support the development of individual, regional and provincial marketing programs.
- The marketing of culture and heritage should be organised on a regional basis in order to provide a sufficient number of organizations within a geographic area to co-operate in marketing as well as to provide a sufficient number to attract tourists to a region.
- Those organizations that are not market-ready should be encouraged to ensure they are at least listed with local visitor information centres and regional tourism associations and to have basic information available.

Short-Term Options for Development

The following short term options have been identified to stimulate interest in culture and heritage tourism, demonstrate its potential and develop models for action in the short term with minimal resource investment. There are currently initiatives underway in the Province which can be supported and others which can be easily started which follow from the Strategic Directions. These can be initiated prior to the development of other plans or strategies.

1. Creation of a marketing consortium of the "market-ready" culture and heritage organizations in the province.
2. Develop the information resources required to assist "near market-ready" organizations to improve their marketability. Tourism BC should assess the potential for marketing and partnership opportunities in the cultural tourism sector.

3. Resources should be allocated to support product development and marketing of the Gold Rush Trail.
4. An area specific model of product development should be undertaken to identify the steps and process of development in the Okanagan.
5. Examine the product development program model provided by the Ministry of Agriculture's "BC Product" program with a view to adapting it to include arts, crafts and publications produced by BC residents in the Province.
6. Explore the development of an electronic information and sales system.
7. Encourage the discussion of product development and marketing issues and opportunities through provincial and regional Boards.

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1 Introduction

1.1 Background

Culture is generally regarded as the values and beliefs of a society, including tangible sites, facilities and organizations along with intangibles such as values. Heritage can be regarded as the inheritance of culture --or those things which reflect past society. A subset of culture, and probably the most common perception of culture, are the arts. The arts can be considered the current expression of culture, often manifesting themselves in writing, legends, visual arts, performing or media arts.

Cultural tourism became recognised as an important component of international tourism in the early 1980's. The World Tourism Organisation defined cultural tourism as "covering all aspects of travel whereby people learn about each other's way of life and thought."[1] This is a very broad definition as it could encompass practically all forms of tourism from skiing to shopping.

The merging of 'tourism' with culture represents an opportunity for a symbiotic relationship that can benefit both. Tourism provides the cultural sector with an opportunity to develop new audiences, not only to understand and appreciate their product but also to help generate additional revenues. Culture provides tourism with a 'new' product offering, one for which there is a substantial market. Culture represents "complementary inducements to travel" that meet the need of travellers seeking "symbolic variety and meaning in their tourism experience."[2]

Tourists who would like to experience the culture of different destinations represent one of the largest market segments in most of the large tourism markets. About 1/3 of US travellers reported taking a trip which included taking part in heritage or culture activities. The size of the segment ranges from 31% of the UK travel market to 45% of the Japanese travel market. This growing market demand for culture has stimulated many destinations to develop their cultural resources to meet the demand and enhance their tourism industries.

There are some destinations that have been notably successful. The UK recognised in the 1970's that one of the tourism products they could easily develop that was unique (at that time) to the market was heritage -- particularly their heritage sites. The British Tourism Authority encouraged the many historic sites in the UK to open themselves to tourists. This was a way to both pay for some of the maintenance and preservation required by the sites as well as to attract new markets to the country.

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[1] As quoted in ARA Consulting Group. Nova Scotia Cultural Tourism Study, Nova Scotia Economic Development and Tourism, 1997

[2] Claude Moulin, "Cultural Heritage and Tourism Development in Canada," Tourism Recreation Research, 16(1), 1991. page 51

Other countries and destinations have followed this example. In nearly all destinations, there exists an indigenous culture and/or some form of heritage that can easily be developed. With an existing "product," destinations can package and present it in a way that will attract the target market.

The BC tourism industry has long marketed BC as an outdoor and touring destination. BC's Super, Natural image is based on the "super range of activities you can do in BC's natural environment."[3] BC's tourism marketing has not generally included its cultural and heritage resources.

Expo 86 changed this situation to some degree. Some of the major attractions of Expo were the international cultural events staged as well as greater exposure to BC's heritage (particularly First Nations). As Expo 86 was being developed and the Coquihalla Highway was finished, pressure to address the loss of traffic through the Fraser Canyon led to a product development initiative to develop the "Gold Rush Trail." Some marketing was undertaken to promote this heritage product but the marketing was not sustained in the 1980's, and only recently has it been revived by the newly-formed Cariboo Gold Rush Trail Action Alliance.

Following Expo, Tourism British Columbia, in conjunction with a federal program under the Department of Communications, launched a major cultural tourism initiative using performing arts in Vancouver as a basis for packages directed to the San Francisco market. The program, with Canadian Airlines and other partners, was not successful. This was the last major cultural tourism campaign by the Province.

Also following Expo, the Ministry of Tourism was combined with the Culture, Heritage and Recreation division to form a combined Ministry (later reorganized as the current Ministry of Small Business, Tourism and Culture). This led to an additional focus on the part of many of the heritage operations and the Royal BC Museum to develop their product and promote themselves to tourists. In turn, this led to some provincial scale marketing initiatives, and more importantly, to greater integration between the regional tourism marketing associations and the heritage and museum properties. The relationships developed during this time remain in place today.

Tourism Vancouver, and to a lesser extent Tourism Victoria, began to build some of their tourism marketing on their cultural and heritage resources. Vancouver's Entertainment Season program features the full range of performing arts events and cultural attractions, combined with low off-season hotel rates.

In 1997, the Canadian Tourism Commission and the Department of Canadian Heritage organised a series of workshops to identify issues and potential opportunities for developing cultural and heritage tourism in Canada. A five-year

[3] McKim advertising circa 1990

business strategy was produced, Packaging the Potential,[4] that identified strategies in five areas. As of the writing of this report (October, 1999), the Committee is considering the next actions to be taken to implement the recommendations in the Report. References to this document will be found throughout this Report.

Despite the above, BC's cultural resources are generally not well represented in BC's tourism marketing. The exception to this might be the emerging focus on aboriginal tourism. However, the 1999/2000 Tourism BC Business Plan makes only passing reference to cultural tourism as a potential product and does not identify the culture and heritage segment as a target market.

Nevertheless, there remains considerable interest on the part of Tourism BC and the Ministry of Small Business, Tourism and Culture to identify the potential opportunities for cultural and heritage tourism. This report is a result of their commitment to exploring the potential for cultural and heritage tourism in BC.

1.2 Project Objectives

The purpose of this project is to work toward the development of a Culture and Heritage Tourism Strategy for British Columbia. Toward this end, this report will provide an overview of existing product and market information and will develop a series of options for further review by the Government, Tourism BC and stakeholders. Specific objectives include:

1. To build on the work underway by the Canadian Tourism Commission on developing the cultural tourism product, but ensuring that a BC perspective is maintained in the approach to the project.
2. To develop a working definition and classification system for the BC cultural tourism product.
3. To build an initial inventory and identify gaps in the supply of the cultural tourism product in BC.
4. To identify and assess the market demand information available and identify gaps in the data available.
5. To develop a model for development of the BC cultural tourism product and identify the necessary steps, the stakeholders and the resources required to implement the model.

It is the intention of the Ministry of Small Business, Tourism and Culture and Tourism BC to review this Report with stakeholders.

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[4] Prepared by the Cultural and Heritage Tourism Sub Committee of the Industry and Product Development Committee of the Canadian Tourism Commission.

1.3 Definitions

In its broadest definition, cultural tourism can be interpreted to include almost all tourism activity, particularly if the intangible aspects of culture are considered. In addition to the more commonly accepted definition that includes both arts and heritage, cultural tourism can also include:

- Natural history – experiencing the flora and fauna of a region;
- Ecotourism – a range of adventure, nature-based vacation experiences;
- Sport tourism – vacations which include participation or viewing of sport;
- Agri-tourism – vacations to experience agricultural life and products;
- Cuisine tourism - vacations which focus on experiencing the gastronomic delights of a region; and
- Industrial tourism – vacations which include experiencing the industrial heritage of a region at sites or in museums.

While many clarifications on the general definition of cultural tourism developed by the WTO have subsequently been provided over the years, more operational descriptions have focused on the notion that cultural tourism involves:

> "visits by people from outside the host community motivated wholly or in part by interests in historic, artistic, scientific, or lifestyle heritage offerings of a community, region, group or institution."

This definition is similar to that used in Packaging the Potential: "Cultural and heritage tourism occurs when participation in a cultural or heritage activity is a significant factor in a trip." The CTC report identifies the following principles of cultural and heritage tourism:

- "Cultural and heritage tourism involves a quality visitor encounter with a cultural or historic experience that is authentic, and is not created solely for the purposes of attracting tourists"
- "Cultural and heritage tourism must be sustainable and must ensure that the quality and integrity of the cultural or heritage resource/experience are conserved"
- "Culture and heritage tourism is based on a mutually beneficial partnership between the culture/heritage sectors and must be a revenue generator for both sectors."

This Report uses this definition for guidance as it frames strategic relationships which exist between tourism markets, cultural and heritage products and local communities in developing a sustainable tourism industry. Throughout this report, the reader may find references to 'cultural tourism.' In this report, the phrase is meant to include only the arts and heritage portion of cultural tourism to be consistent with the CTC.

However, tourism market demand data does not generally lend itself to defining cultural and heritage tourism using this definition. The critical issue lies in the motivation for a trip or visit – " a significant factor in a trip." Tourism data generally includes information on trip activities – what tourists do on their trip. This is relatively easily measured. The motivations for trips can also be determined, but tourists will often have more than one motivation for a trip. Determining at what point culture and heritage are a "significant factor" is difficult with available data sources.

For practical purposes, market potential will be assessed using trip motivation information that suggests when culture and heritage are important factors in trip selection. Participation in culture and heritage events or activities will be assessed through activity data that indicates whether or not a tourist participated on a particular trip in culture and heritage activities.

1.4 Project Scope

The definition of cultural tourism used in this Report is more restrictive as it is based on participation in Arts and heritage activities. Throughout this report, there are references to 'cultural tourism'; this phrase is meant to include only the components included in this more restrictive definition. This report will follow the approach used in Packaging the Potential in order to provide consistency and continuity with any actions taken at the national level by the CTC or the Department of Heritage.

This report will be specifically concerned with aspects of culture and heritage that create tourist products:

- The Performing Arts (Theatre, Dance, Music)
- Visual Arts and Crafts
- Museums and Cultural Centres
- Historic Sites, Villages and Interpretative Centres
- Festivals

It is recognised that these limitations exclude some types of culture and heritage tourism. Social, natural and even industrial heritage are legitimate expressions of heritage. But as the approach is widened to include these, there is an element of risk in widening the concept too far and encroaching on other types of tourism such as ecotourism, demonstration forests or winery tours that are commonly thought of as existing within different classifications. As work progresses on the development of the above sectors, the relationship to those sectors not included in this report should also evolve.

Within the above definition, there is one significant culture and heritage activity that continues to be the subject of special attention – Aboriginal Tourism. Tourism BC has been working to assist in the development of Aboriginal Tourism

BC (AtBC). The focus of AtBC is on Aboriginal ownership and economic issues within the broadest definition of tourism.

The purposes of the Aboriginal Tourism Association of BC are to:

- foster the economic advancement and professional development of Aboriginal tourism operators with the province of British Columbia;
- create a united Aboriginal tourism industry and provide a collective voice for Aboriginal tourism operators;
- assist members to achieve their individual and group marketing objectives;
- support and promote understanding and respect of Aboriginal societies, cultures and traditions and assist with the repatriation of the heritage of First Nations; and,
- develop relationships with other groups and/or regions with similar mandates such as other tourism societies, First Nations, and industry representatives in establishing further positive developments.

Aboriginal Tourism is of sufficient importance to the BC tourism industry in its own right to be the subject of its own planning and development initiatives. With the work being undertaken by AtBC and Tourism BC, this sector will not be included as part of this project to avoid duplication. However as work is being undertaken concurrently on the development of Aboriginal Tourism, a collaboration between the two sectors will be required. As will be noted from the material in this paper, there is considerable opportunity for mutually beneficial activities and programs.

A specific example of a successful aboriginal tourism attraction elsewhere in Canada is described in section 4.5.

2.0 BC's Cultural Tourism Resources

2.1 Introduction

This chapter presents background information concerning the typology and supply of cultural tourism resources in BC. The intent of this section, and the accompanying inventory in the Appendix, is not to present a comprehensive listing of all cultural and heritage resources in the Province. Rather, it is intended to serve as a starting point for further work.

Cultural tourism brings together personal motivations (e.g., market travel triggers related to artistic, historical and education interests) with travel catalysts (e.g., tangible attractions such as cultural institutions, events, lifestyles and heritage). In the context of this study, cultural tourism products or experiences include: institutions (e.g. museums, galleries, theatres, performing arts centres, science centres); lifestyle / heritage opportunities (e.g., heritage districts and facilitates, streetscapes, monuments, customs, language and gastronomy); and events (e.g. festivals, fairs special events, exhibitions and competitions). Some of these cultural attractions may be created expressly for visitors (e.g. museums or festivals) or may simply be inherent in the community (e.g. streetscapes), or may be a combination of both. The degree to which the cultural experience is made accessible to tourism interests is essentially a community decision — or should be. This factor of self-determination is critical to both the authenticity of the experience and to its effective marketing.

2.2 BC Cultural Tourism Resource Classification

Cultural tourism resources have been traditionally categorised in a variety of ways in varying contexts. Generally, these cultural classifications have been linked to the anthropological, artistic, historic, and landscape dimensions of specific geographic regions. Anthropological cultural tourism resources are comprised of the customs, folkways, dress, language, religion, food and music associated with the people of an area. Artistic cultural tourism resources are the physical expressions of an area's culture as portrayed through the performing and visual arts and crafts. Historic cultural tourism resources are those sites and activities that highlight an area's history, people and their interaction with the environment. Cultural landscapes are the urban and rural landscapes, architecture, streetscapes, natural areas and historic places which reflect an area's unique heritage.

Depending on the geographic focus and purpose of the cultural tourism initiative, varying subsets of these four classes of cultural resources are given differing amounts of emphasis. In the context of this project, three overriding types of resources, each with their own distinct subset of categories, were identified as being of immediate concern for the project's steering committee. While other resources were considered to be important for additional inventorying and

strategy development (e.g., natural heritage, aboriginal heritage), it was determined that only three classifications would be addressed on a model development basis at this time. They are:

- ***Visual and Performing Arts***. Visual art tourism resources are those forms of visual expression that are displayed through special exhibitions, gallery tours, craft / art studios and fairs. Performing arts resources pertinent to tourism are those music, theatre and dance events which seek to cater to both resident and tourism patrons.

- ***Historic and Heritage Resources***. These resources are comprised of heritage facilities and programs, as well as museums, which cater to local and non-local visitors. *Built heritage* resources include historic sites, memorials and monuments, interpretative and cultural centres, as well as unique and representative architecture (built structures) and landscapes. *Activity-based* heritage resources include those re-enactments and interpretative programs that display and interpret significant local and regional history and events. *Museums* include a wide range of art, community heritage and science/industrial institutions, which provide custodial and interpretative services for unique and representative cultural resources.

- ***Festivals***. These attractions are comprised of short time-span, hallmark, one-time or regularly scheduled events, which draw residents and/or tourists to their cultural venues. In the context of this work, performing and visual arts, community and heritage, as well as special interest cultural events comprise the festivals portfolio.

2.3 BC's Cultural Tourism Resource Mix

The mix of cultural resources potentially suited to inclusion in a provincial cultural tourism strategy is rich in BC. However, because of the very diverse, interwoven and often spontaneous nature of these resources it is difficult fully capture their:

- specific classification;
- number and spatial distribution;
- magnitude and quality;
- interest in and focus on attracting local and /or tourist markets.

Those tourism resources identified in this document include only those sites, facilities and programs, which are promoted in either commercial or publicly-produced tourism brochures, guides, and other media. Consequently, it is quite likely that some significant cultural resources suited to tourists but not currently promoted to such markets may have been missed in the inventory process. Similarly, given the relatively limited amount of information available concerning each of the identified resources, and the diverse array of programs associated with these assets, it is very possible that some of them may have been

designated to the wrong classification. Indeed in some cases, a specific cultural tourism resource may have been appropriately placed in several categories. However, for the purposes of this project, all cultural tourism resources were placed in the category which appeared to best capture their primary activity emphasis. As well, because of the relatively limited information available concerning these cultural resources, opportunities to judge their "readiness" for cultural tourism markets were not possible. A listing of the information sources used to prepare this inventory is provided in the appendix at the end of this report. The data presented describe only the incidence of such resources. Future research must be conducted to determine their overall quality with respect to tourism "drawing power" and visitor capacity, as well as managerial and community support.

Based on the incidence of cultural assets identified in tourism promotion initiatives across the province, and the provisos identified in the preceding paragraphs, the following estimated mix of cultural tourism resources is provided.

Heritage and Historic assets comprise almost two-thirds (58%) of all the province's cultural tourism resources. Within this category, a combination of museums (53%), built heritage resources (41%), and related heritage activity-based resources (6%) comprise the heritage-historic cultural tourism portfolio.

Distinct subsets of heritage and historic resources are found within each of these cultural tourism groupings (Table 1). For instance, the largest proportions of museums are primarily art-related facilities (48%), or community-based museums (41%). Similarly, the mix of heritage resources is quite diverse. Here, the heaviest concentrations of built heritage tourism resources are linked to historic sites (84%) and cultural interpretative centres (13%). Activity-based heritage resources are primarily (94%) associated with interpretative programs.

From a geographic perspective, the greatest proportions of the heritage/community museums are found in the Islands (26%) and Vancouver Coast and Mountains (25%) tourism regions. The largest share (28%) of historic sites is located in the Thomson-Okanagan tourism zone (Table 2).

Festivals comprise another quarter (24%) of BC's promoted cultural tourism attractions. Within this category, *community / heritage* (51%), as well as performing and *visual art* events (37%) make up the lion's share of the festivals that are promoted as tourism attractions (Table 1). The largest concentration (41%) of community-based festivals occurs in the Vancouver Coast and Mountains tourism region (Table 2).

Performing and Visual Arts resources comprise the remaining 18% of the province's currently promoted cultural tourism portfolio. Within this category, *visual arts* represent about two-thirds (68%) of the resource base. The largest proportions of this activity are associated with craft/art exhibition/studio displays

(43%), and craft/art fairs (41%) (Table 1). The largest proportion of these craft/art fairs and studio exhibitions tend to be found in the Islands tourism region.

The lion's share (72%) of those performing arts events promoted to tourism markets is associated with theatre and dance activities. The Tourism Association of Vancouver Island has the largest proportion (33%) of craft / art exhibitions. Performing arts associated with theatre and dance are most concentrated (56%) in the Vancouver Coast and Mountains region (Table 2).

Table 1: Estimated Overall Cultural Tourism Resource Mix

Cultural Resource Category	Cultural Resource Subset	No. of Resources Identified	Percentage of Cultural Resources	Percentage of Resource Subset
Heritage and Historic Resources	**Museums**		30.6	
	• Art	293		48.3
	• Heritage/Community	252		41.5
	• Science	62		10.2
	Total	**607**		**100.0**
	Built Heritage		24.1	
	• Historic Sites	403		83.8
	• Memorials & Monuments	14		2.9
	• Interpretative & Cultural Centres	64		13.3
	Total	**481**		**100.0**
	Activity-Based Heritage		3.3	
	• Historical Reenactments	4		6.1
	• Interpretive Programs	62		93.9
	Total	**66**		**100.0**
Visual and Performing Arts	**Visual Arts**		12.3	
	• Special Exhibitions	31		12.6
	• Gallery Tours	9		3.7
	• Craft/Art Exhibitions & Studios	106		43.1
	• Craft/Art Fairs	100		40.7
	Total	**246**		**100.0**
	Performing Arts		5.7	
	• Music	32		28.1
	• Theatre & Dance	82		71.9
	Total	**114**		**100.0**
Festivals	**Festival**		24.0	
	• Performing & Visual Arts	178		37.1
	• Community/Heritage	242		50.7
	• Special Interest	58		12.2
	Total	**478**		**100.0**
TOTAL		**1992**	**100%**	**n/a**

Note: This table does not include architecture. Some of the 1992 resources identified are multi-use facilities, and have therefore been counted more than once.

Table 2: Cultural Tourism Resource Distribution by Region

		Percent of Tourism Products by Region for Each Sub-Category (%)					
Category	Sub-Category	BC Rockies	CARIBOO COUNTRY	Northern BC	The Islands	Vancouver, Coast & Mountains	Thompson Okanagan
Performing Arts	Music	6	0	6	33	45	9
	Theatre & Dance	6	4	7	16	56	11
Museums	Art	4	2	8	24	56	6
	History/ Community	16	6	14	26	24	19
	Science	13	0	5	21	44	18
Festivals	Performing & Visual Arts	14	6	5	12	41	21
	Community/ Heritage	8	4	14	17	33	24
	Special Interest	5	3	17	19	36	19
Visual Arts	Special Exhibitions	13	6	26	26	10	19
	Gallery Tours	44	0	0	44	11	0
	Craft/Art Exhibitions	11	9	5	35	24	16
	Craft/Art Fairs	12	7	9	32	18	22
	Architecture	5	5	0	40	50	0
Heritage – Built Environment	Historic Sites	15	11	12	21	14	27
	Memorials & Monuments	21	14	21	21	0	21
	Interpretative & Cultural Centres	8	10	17	22	25	17
Heritage – Activity-based	Historic Reinactments	0	0	25	0	50	25
	Interpretative Programs	16	16	32	16	16	5

Note: Each horizontal row totals ~ 100% of the provincial total for each product

3 Cultural Tourism Market Review

3.1 Introduction

This chapter describes the characteristics of Canada and BC's cultural tourism markets. It does this by examining existing data bases containing traveller and trip behaviour information concerning persons with a stated predisposition to participate in culturally-based tourism activities. Unfortunately, these databases vary in both their ability to clearly identify specific types of cultural tourism travellers, and their ability to isolate the magnitude of existing and future cultural tourism markets for BC. This becomes especially challenging when efforts are made to estimate the economic impact of these travellers. Consequently, this report does not provide any approximation of the value of these travellers. Rather it only infers that the probable economic influence of these visitors is substantial and comparable to other leading forms of tourism development in BC.

Further research into the economic impact of these markets should be examined, particularly in light of the expected growth in demand for cultural travel that will be driven largely by the rapidly expanding travel market of North American senior travellers. It is this travel market group which appears to have the greatest propensity for travel motivated by cultural factors.

Nonetheless, in composite these databases do offer useful insights into the overriding characteristics, magnitude, and potential growth opportunities associated with these markets. For the purposes of this report, only those travel databases that were readily accessible, relatively fresh (post 1994), and key travel markets for BC were examined. Specifically, information derived from travel markets in the United States, Japan, U.K., Germany, Canada, and BC was investigated. Efforts were made in each of these cases to use similar operational definitions of "cultural travellers." However, inconsistencies in the types of variables used to identify the characteristics of market survey respondents made exact comparisons difficult. Wherever possible, potential cultural tourists were defined as those individuals who had indicated that participating in pursuits which were primarily cultural in nature was somewhat or very important to them when travelling. Where feasible, existing cultural travellers were designated to be those individuals who had participated in pursuits which were indisputably cultural in character (e.g., visiting museums and historic sites, attending performing arts, frequenting art galleries etc.), or had a strong cultural component associated with them (e.g., visiting local craft shops events, festivals etc.). Wherever possible, comparisons between similar cultural tourism demand indicators are used. However, even where this is done, variances in the timing and data collection methods used to collect the information contained in these data bases occur. Consequently, for strategic planning purposes the overall conclusions drawn from this review of these data are presented as broad overriding findings that seem to be reverberate throughout the studies.

3.2 United States Cultural Traveller Market

Travel data base information concerning U.S. cultural travel markets was not readily available to the study team. Consequently, secondary sources were used to establish overriding characteristics of this market. It should be recognised that these data pertained to U.S. cultural tourists in general as opposed to BC-bound American cultural tourists. More specific information concerning U.S. cultural tourists visiting BC should be obtained from further analyses of the BC Non-Resident Visitor Study and the Statistic's Canada's International Travel Survey data bases.

U.S. Travel Industry Association data suggests that about 1/3 of all U.S. adults (65.9 million persons) reported taking an historic and /or cultural trip in 1996 (TIA, 1997). About half (50%) of these travellers took part in at least one trip with an "historic" component. Historic trips were defined as those involving visits to historic places and museums. Of the trips generated by "historic" travellers (53.6 million trips) about 19% were primarily prompted by interest in seeing historic places or museums. Another 44% of these trips had similar factors as secondary reasons driving their occurrence.

The other half of the U.S. historic/cultural market was interested in other cultural features in their travel. Approximately 37% (12.3 million) of these "cultural" travellers claimed that interest in attending a cultural event or festival had been the primary motivation for their trip. Another 34% of them felt that these cultural opportunities were secondary but still important motivators in their decisions to travel.

When compared to the average U.S. traveller, the "historic and cultural" visitor market tended to be:

- slightly older (48 years average) than the average U.S. traveller (46 years average);
- more likely to be retired;
- less likely to have children;
- slightly more educated and affluent;
- more likely to pursue a greater number of activities;
- more likely to visit state and national parks;
- more likely to use commercial accommodation (i.e., hotels, motels, bed and breakfast facilities);
- more likely to shop;
- more likely to take group tours (twice as likely);
- more likely to stay longer (4.7 nights vs. 3.3 nights for U.S. average traveller);
- more likely to spend more money ($615 per trip vs. $425 per trip for U.S. average traveller).

Other market data derived from other Travel Industry Association of America documentation suggested that:

- About three-tenths (29% or 26.7 million adults) of all cultural travellers added extra time to their trip because of cultural, arts, heritage or historic activities/events encountered on their travel. (TIA, National Travel Survey - Partners in Tourism, 1998). Of those travellers who added time:
- 61% added part of one day;
- 30% added one night;
- 5% added two extra nights;
- 4 % added 3or more nights.

While the findings are becoming more dated at this point, in 1994, BC and other western Provinces undertook an examination of the travel markets in the "Northern Tier States." A part of their research involved the development of attitude and interest based travel market segments, which reflected the characteristics of travellers from these U.S. regions. One of the segments, representing an estimated 12% of the market at that time (i.e., about 178,000 travellers in the region's 18 largest urban areas) was comprised of Heritage travellers.

Those characteristics, which differentiated this Heritage segment from other travel groups in this region, were their stronger tendency to:

- be interested in visiting historic sites, museums and art galleries;
- be interested in viewing local festivals and crafts;
- be older, and to pursue "non-active" types of experiences;
- be more price-sensitive and value-conscious in their travels;
- associate BC with safety and security;
- associate BC with historical sites and shopping and place a high importance on the availability of the activities in their selection of travel destinations; and
- have a higher recall of advertising for BC.

Most travel segmentation studies done in Canada and the United States reveal the existence of at least one segment with an interest with a strong heritage and/or cultural orientations. Such analyses are used to gain a better understanding of the motivations and attitudes of travellers so that customised travel packages can be developed for them. As well, such segmentation research helps marketers develop tailored and relevant communications with these potential travellers. The process of combining individuals with similar travel motivations and attitudes also facilitates the identification of market groupings that are sufficiently large to make marketing to them feasible. Market segmentation on the data from the BC Resident and Visitor studies is possible, but has not been undertaken to date.

3.3 Overseas Cultural Traveller Markets

Because of the growing importance of international travel markets to BC, cultural tourism market data associated with key overseas geographic market origins were investigated. More specifically data from long haul pleasure travel market studies conducted in the United Kingdom, Germany, and Japan were analysed and summarised for use in this strategy. These German and U.K. data were collected on behalf of Tourism Canada and the U.S. Travel and Tourism Administration in 1996. The Japanese data were collected in 1995 for the Canadian Tourism Commission, The U.S. Travel and Tourism Administration, and the Secretaria de Turismo (Mexico). These databases provide a wealth of travel data concerning the travel characteristics of existing and potential cultural tourists interested in coming to Canada for their long haul vacations. However, they do not have sample sizes of sufficient magnitude to permit customised analyses of BC-destined cultural travellers. Nonetheless, the general cohort of cultural travellers that they include is of direct relevance to BC tourism.

The following discussion summarises the relative magnitude and overriding characteristics of these markets. In each case, the operational definition of cultural tourists are those respondents who state that:

> "Museums and art galleries or arts and cultural attractions (e.g. live theatre, concerts, dance, opera, ballet) or local crafts and handiwork/festivals or historical or archaeological buildings and places" are always important to them when selecting a holiday destination (long-haul).

3.4 Estimated Potential Market Size

Of the three international long haul travel markets examined for this strategy, Japanese travellers appear to provide the largest market of potential cultural tourists for Canada. Based on 1995 population estimates and the stated preferences of respondents in each of the market surveys, the potential for attracting Japanese "cultural interest" pleasure travellers to Canada exceeded 4.9 million visitors for the period 1995 to 2000. United Kingdom and German estimates for the period 1996-2001 ranged from about 2.4 million for U.K. travellers to 1.7 million visitors for German visitors (Table 3). Appendix 1 provides more detailed information on Canada's potential long haul cultural pleasure travel market sizes from these three countries. As well Appendix 1 also summarises the socio-demographic, overriding travel motivation, and general trip characteristics of these markets.

Table 3
Summary Of Potential Long Haul Pleasure Culture Travel Markets

Market Indicator	Japan	U.K.	Germany
Approximate Adult Population (18 Years Or Over)	94,794,000 [1]	46,007,000 [2]	65,498,000 [3]
Incidence Of Long-Haul Pleasure Travellers	26.0% [1]	29.4% [2]	27.6% [3]
Potential Adult Long-Haul Pleasure Travellers	24,779,000 [1]	13,526,058 [2]	18,077, 448 [3]
Potential Culture Travellers [4]	45.2%	31.5%	40.9%
Estimated Culture Traveller Volume	11,200,108	4,260,708	7,393,676
Incidence of Culture Traveller (Interest) In Canada	69.1%	71.6%	26.8%
Estimated Culture Traveller (Interest) Volume In Canada	7,739,746	3,050,667	1,981,505
Incidence of Culture Traveller (Interest & Likelihood) Visiting Canada - Next Five Years	63.9%	79.0%	86.7%
Estimated Culture Traveller (Interest & Likelihood) Volume To Canada --Next Five Years	4,945,397	2,410,026	1,717,965

[1] Pleasure Travel Markets To North America. Japan. Final Report. 1995. Page iii.

[2] Pleasure Travel Markets To North America. United Kingdom. Travel Trade Report. 1996. Page 85.

[3] Pleasure Travel Markets To North America. Germany. Travel Trade Report. 1996. Page 82.

[4] Museums and art galleries or arts and cultural attractions (e.g. live theatre, concerts, dance, opera, ballet) or local crafts and handiwork/festivals or historical or archaeological buildings and places are always important to you when selecting a holiday destination (long-haul).

3.5 Traveller Characteristics

Socio-demographic Traits

International travellers interested in cultural tourism opportunities exhibited several similar socio-demographic traits. Generally these markets were comprised of slightly greater proportions of baby boomer females, coming primarily from adult, married, two person households. The vast majority of these travellers did not have friends /relatives living in Canada.

Beyond these commonalties the markets varied on several socio-economic traits. Appendix 1 summarises the socio-demographic traits of each of these potential cultural travel markets.

General Travel Motivations

Each of the travel markets cited some common overriding general travel motivations, which drove their interest in long haul travel holidays. In particular, these common travel stimulators were linked to destinations possessing outstanding environmental quality and scenery; nice weather; opportunities to learn about places, people and things; and good value for money spent in the destination. They also expressed a common motivation to visit places where there was a good variety of things to see and do. However, other travel motivators helped to differentiate each of these markets. In particular, the Japanese and U,K markets placed more importance on travelling to destinations that had interesting historical places or heritage buildings to visit, as well as good public transportation systems. Conversely, the German market was particularly motivated to travel to destinations with interesting local cuisine and /or new foods. (Appendix 1). Personal safety, as well as interesting and friendly local people were also important travel triggers for the U.K and German travel markets.

3.6 Canadian Cultural Travel Market

Quantitative information concerning the characteristics of the overall Canadian cultural tourism market is sketchy and relatively dated. However, one source of more credible information in this regard is the Canadian Tourism Commission's database associated with domestic travel markets. The Domestic Tourism Market Research Study (Coopers & Lybrand 1996) and its comprehensive data base examines in detail the motivations, attitudes and perceptions of Canadians about their leisure travel patterns. Conducted in 1996, it reports on the travel characteristics of over 3,000 Canadians systematically interviewed by telephone or in-person in all regions of the country. For the purposes of this report these data were analysed in the context of cultural travellers. Cultural travellers defined in this context were only those survey respondents who indicated that: "Museums and art galleries, arts and cultural attractions (e.g. live theatre, concerts, dance, opera, festivals) and historical places or buildings" were often or always important to them personally, when deciding on a destination for vacation, recreation or holiday.

Using this definition, it is apparent that approximately a quarter (25.1%) of Canadian overnight travellers in 1996 were potential cultural travellers (Table 4). The vast majority of them (90.9%) expressed strong interest in pursuing culturally related activities in the near future. Indeed almost half of them (46.7%) indicated a strong likelihood of taking part in the two years following their interview. Furthermore, the CTC's Domestic Tourism Market Research Study suggests that that the consumption of cultural products by BC residents was far greater when

vacationing in the U.S. than when travelling within BC It indicates that this phenomenon presents an opportunity to convert these U.S.-bound travellers to BC travellers through increasing the province's product inventory. More information concerning the socio-demographic and travel behaviour of these potential cultural travellers is described in summary format in Appendix 2.

Table 4
Estimated Domestic Culture Travel Market Size

Market Indicator	Canada
Overnight Pleasure Travellers [1]	16,225,000
Potential Culture Travellers [2]	25.1%
Estimated Culture Traveller Volume	4,072,475
Incidence of Culture Traveller (Interest) In The Next 2 Years	90.9%
Estimated Culture Traveller (Interest) Volume In The Next 2 Years	3,701,880
Incidence of Culture Traveller (Interest & Likelihood) - Next Two Years	46.7%
Estimated Culture Traveller (Interest & Likelihood) - Next Two Years	1,728,778

1Those who have taken or intend to take an overnight pleasure trip.
2Museums and art galleries, arts and cultural attractions (e.g. live theatre, concerts, dance, opera, festivals) and historical places or buildings are often or always important to you, personally, when deciding on a destination for vacation, recreation or holiday.

3.7 BC - Specific Cultural Tourism Markets

While the preceding descriptions of markets provide useful insights into the potential magnitude of cultural tourism demand in market regions important to BC, little of it deals specifically with travelers who currently use the province for their travel pursuits. Consequently, the market potential and characteristics of BC residents and out-of-province visitors are outlined in the following two portions of this cultural tourism market analysis. Data for this review have been derived from the data bases associated with the BC Non-Resident and BC Resident Visitor Studies conducted in 1995 and 1996 and Statistics Canada's Canadian and International Travel Surveys conducted in 1996. It should be noted that other local research initiatives designed to understand the character of various portions

of BC's cultural tourism markets were reviewed in the course of this investigation (e.g., Survey of Canadian Cultural Tourism Research prepared for Vancouver's Cultural Tourism Initiative; Tourism Victoria Exit Survey 1998; BC Heritage Site Visitor Market Profile Study, 1994, 1997; and BC Arts Consumer Profile (1994). Where appropriate, their overriding findings have been incorporated into the discussion.

3.7.1 BC Non-Resident Cultural Tourism Market

The BC Non-Resident Visitor Study uses self completed survey responses with 6,383 non-residents visiting British Columbia between April of 1995 and March of 1996, to describe the market characteristics of travellers to the province.

Cultural travellers in this study were defined as those respondents who indicated that "visiting historic sites or areas or visiting attractions such as museums, art galleries, zoos, etc" were somewhat or very important to them or their household when choosing to take their trip to BC. Using this operational definition, it was apparent that half (51%) of these travellers claimed to have an interest in culturally-based travel. Their travel represented about 6.1million potential trips generated by this group (Table 5). Furthermore, about seven tenths (71%) of these travellers intended to travel within BC again within two years of their interview (Appendix 3). Further detail concerning the overriding characteristics of these non-residents is summarised in Appendix 3 and 5 of this section.

Table 5
Estimated Non-Resident Cultural Travel Market Size, 1996.

Market Indicator	BC Non-Residents
Non-Resident Volume During Study Period (Oct.1995/Nov.1996)	11,946,000
Potential Culture Travellers [1]	51.2%
Estimated Culture Traveller Volume	6,116,352
Future Intentions (For Travel Within BC):	
Within the next 12 months (41.6%)	2,544,402
Within one to two years (29.0%)	1,773,742
More than two years from now (17.0%)	1,039,780
Not planning to travel within BC (12.4%)	758,428

[1] "Visiting historic sites or areas or visiting attractions such as museums, art galleries, zoos, etc. were somewhat or very important to your household when choosing to take this trip to BC."

Additional published information concerning non-resident cultural travellers to BC is available from Statistics Canada's International and Canadian Travel Survey databases. In particular, Statistics Canada has published Canadian Cities information describing a variety of travel markets including cultural travellers. To date, these data have been analysed only on a city-specific as opposed to a province-wide basis. As well, this information is relatively limited in its ability to provide critical product and market development information. Notwithstanding these issues, some useful information concerning Vancouver-destined cultural travellers from the United States, other combined international, and other Canadian market origins exists. Based on these data it is apparent that in 1996, about 3.1 million same-day and overnight visitors went to Vancouver. Approximately equal proportions of these travellers came from Canada (36%) and the United States (36%), while markets from the Asia Pacific region (13.8%) and Europe (12%) also generated sizeable shares to Vancouver's cultural travel traffic flow. These data also suggest that when compared to Vancouver's overall travel markets, cultural travellers tended to travel in larger parties, stay longer, as well as spend significantly more on a per person and per party basis.

3.7.2 B.C. Resident Cultural Tourism Market

The BC Resident Visitor Study surveyed 11,000 provincial residents by telephone between October 1995 and November 1996. Adults aged 18 years and older were randomly selected to participate from a random selection of households. They were questioned concerning their travel patterns, and more specifically on any business and leisure trips taken within BC, within three months of the telephone interview. For trips to be included in the study, they had to be 80 kms or longer (one way from home) for either a day or overnight in duration. In the context of this analysis, only the responses of cultural tourists are described. Cultural tourists have been operationally defined in this review as being those respondents who indicated that "visiting historic sites or areas or attractions such as museums, art galleries" were somewhat or very important to them, or their household in choosing to take this trip within BC.

A review of these data suggests that considerable demand for cultural tourism exists amongst B.C. residents. More specifically about a quarter (27.6%) of all BC resident respondents placed importance on experiencing cultural attractions or events during their travel (Table 6). This represented an estimated a combined 4.4 million day and overnight trips by these respondents (Appendix 4.). In addition, the intentions amongst these cultural travellers to take their future trips in BC were high. The cultural tourists indicated that about nine-tenths (91%) of these trips were scheduled for destinations in BC in the two years following the study. More detailed descriptions of the socio-demographic and travel behavioural attributes of these travellers is provided in Appendix 4.

Table 6
Estimated BC Resident Cultural Travel Market Size, 1996
(Includes day- and overnight-visits)

Market Indicator	BC Residents
Resident Volume During Study Period (April 1995 - March 1996)	18,656,000
Potential Culture Travellers [1]	27.6%
Estimated Culture Traveller Volume	5,149,056
Future Intentions (For Travel Within BC):	
Within the next 12 months (84.5%)	4,350,952
Within one to two years (6.9%)	355,285
More than two years from now (0.2%)	10,298
Not planning to travel within BC (8.4%)	432,521

[1] Visiting historic sites or areas or attractions such as museums, art galleries were somewhat or very important to you or your household in choosing to take this trip within BC.

In addition, research concerning visitors to BC's Heritage Property Sites was conducted by BC Heritage Properties in both 1994 and 1997. These on-site intercept surveys provided detailed socio-demographic, trip decision making, trip profile and attraction satisfaction information concerning visitors to the Heritage Property sites. Strategic information emanating from the market studies suggested that:

- Almost three quarters (75%) of all visitors to the sites were tourists;
- Almost a third of them (32%) indicated that the presence of these heritage sites was very important to them in their trip planning;
- Learning new things/Increasing my knowledge were the most important travel philosophies during their trip planning processes;
- The most important reasons for visiting the sites was "historical interest";
- Almost half (50%) of the visors were repeat visitors to the sites.

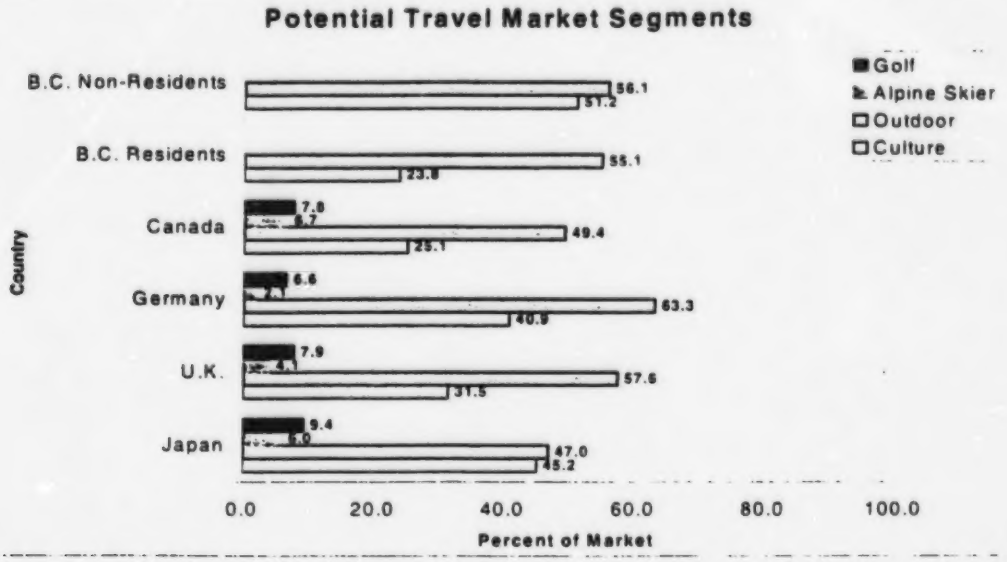
3.8 BC 's Potential Cultural Tourism Market Opportunity

The preceding discussion clearly identifies that market opportunities exist in BC for the development of innovative market-ready cultural tourism experiences. Significant portions of all of the province's major geographic markets place importance on being able to experience various forms of culture during their travels. To place existing and latent demand for cultural tourism in perspective, the following insights and comparisons are provided based on information in Appendix 5:

3.8.1 General Interest In Cultural Tourism Opportunities:

- The importance of pursuing cultural opportunities while travelling varies amongst the province's primary markets. Out-of-province travellers express the greatest interest in pursuing cultural interests on their trips. General interest in pursuing cultural activities varies from a low of 31% amongst U.K. travellers to a high of 45% with Japanese tourists (Table 7);
- A smaller but sizeable proportion of Canadian's place importance on opportunities to take part in cultural pursuits while travelling. Overall, about a quarter of Canadians (25.1%) cite culture activities as an important travel motivator. Only slightly more (27.6%) of the B.C resident travel market place importance on cultural travel opportunities.
- Overall, interest in cultural tourism appears to intensify for travellers interested in visiting BC in particular. At least half (51%) of all non-resident BC visitors claim that participation in cultural endeavours is important to them during their provincial travels.

Figure 7
(Shows the potential percentage of people from key markets who are interested in golf, ski, outdoor and culture – but not necessarily in BC)



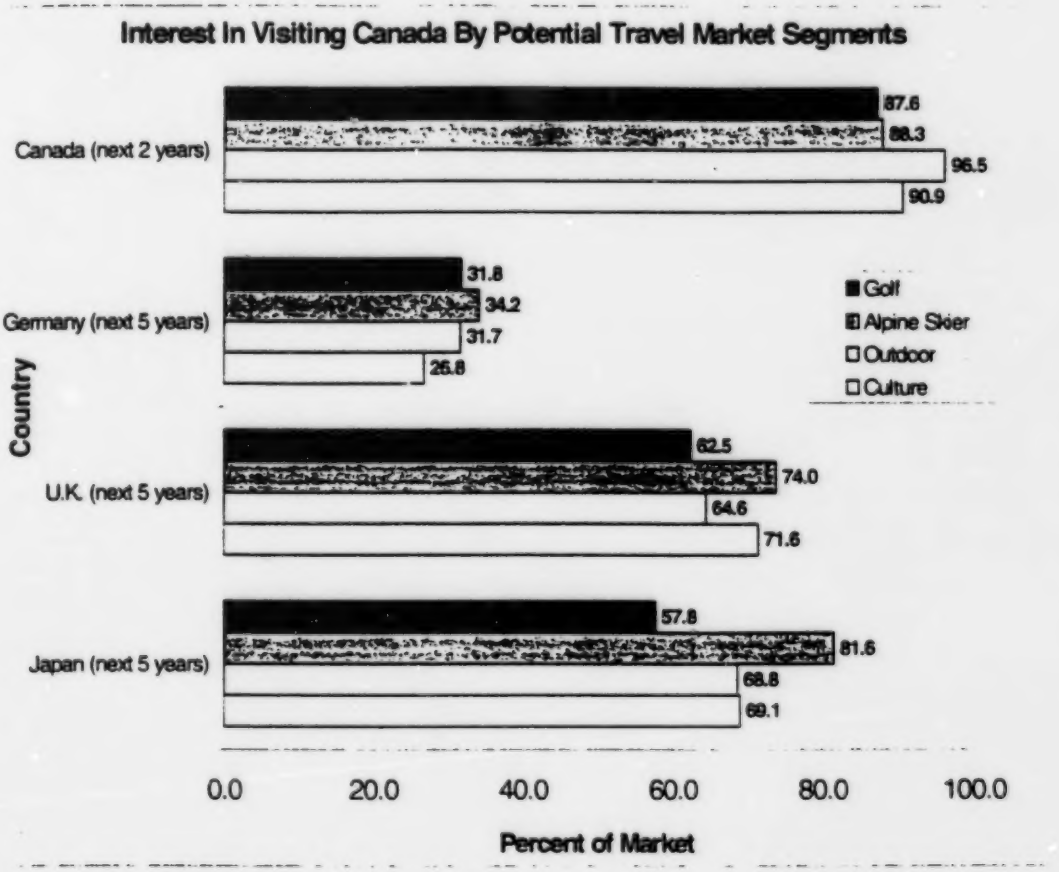
Comparison of Market Interest in Cultural Tourism vs. Other Products

3.8.2 Likelihood of Cultural Tourists Visiting Canada and B.C.

- Cultural tourists place high levels of intended likelihood on visiting Canada in the short to mid-term future. Of those overseas cultural tourists intending to visit Canada, about two-thirds (64%) of the Japanese, and around four-fifths of the United Kingdom (79%) and German (86.7%) markets expressed a likelihood of doing so within a five-year time span (Table 8)

- BC resident cultural tourists express a strong intended likelihood of travelling within the province in the near and medium term future. More than seven tenths (71%) of them plan to travel in BC within a two- year span, and only 12% do not plan to travel in the province at all in the short or medium term (Appendix 5).

Figure 8
Interest in Visiting Canada by Travel Product Group
(Shows specific interest in visiting Canada –not necessarily BC—and not necessarily to participate specifically in these activities.)



3.8.3 Intended Visits Versus Cultural Tourism Trip Incidence

- Incidence rates for cultural tourism participation while on trips tends to vary according to the pursuit and the geographic market. For instance, activity incidence levels associated with U.K. travellers attending cultural events; visiting museums, galleries, places of religious significance; or enjoying local crafts and handiwork while travelling tend to be similar or higher than stated trip interest levels. Conversely, participation in other cultural activities such as attending arts and cultural attractions or festivals; visiting places of

archaeological significance or historical commemoration tend to be lower than stated trip interest levels (Table 9).

- Generally, in all of the BC's major out-of-province travel markets reviewed, activity incidence levels for at least some cultural pursuits tended to be higher than stated general cultural trip interest levels. Amongst non-resident visitors to BC this situation was most pronounced. While a sizeable proportion (51%) of these non-resident visitors expressed a strong interest in cultural travel, a very limited group of them actually took part in such activities on their most recent trip. For example, only 19% of them visited art galleries, museums and exhibits; another 6% attended concerts or live theatre; around 5 % frequented historic sites; and 4% went to local festival fairs and events (Appendix 5).

- Cultural tourism incidence levels tended to be lower in BC's domestic as opposed to international markets. For most specific cultural activities examined, actual incidence levels amongst Canadian travellers were lower than their stated general interest in trips of this type. For instance, while approximately 25% of Canadian travellers placed importance on pursuing trips with a cultural flavour, less than that proportion had actually taken part in any activities of this type on their most recent trip. This situation was even more pronounced in the B.C. resident travel market. About a quarter (26%) of the B.C. resident travel market placed importance on pursuing cultural experience in their travels. However, actual incidences of participation in such activities as visiting historic sites (16%); art galleries and museums (11%); and local festivals, concerts and fairs (9%) were not as great as the expressed general interest in such pursuits (Appendix 5).

3.8.4 Comparisons of Trip Interest Levels In Cultural, Outdoors, Golf and Alpine Skiing

- Interest in cultural tourism pursuits amongst BC's international markets compares favourably with interest levels associated with outdoors, golf and alpine skiing experiences. General interest in cultural tourism ranks second only to outdoor activity interest levels amongst Japanese, United Kingdom and German travellers (Appendix 5). The size of the interest level gap between these two types of pursuits is least pronounced in the Japanese market, where interest levels in cultural pursuits (45.%) approximate those levels associated with outdoor pursuits (47%) (Appendix 5).

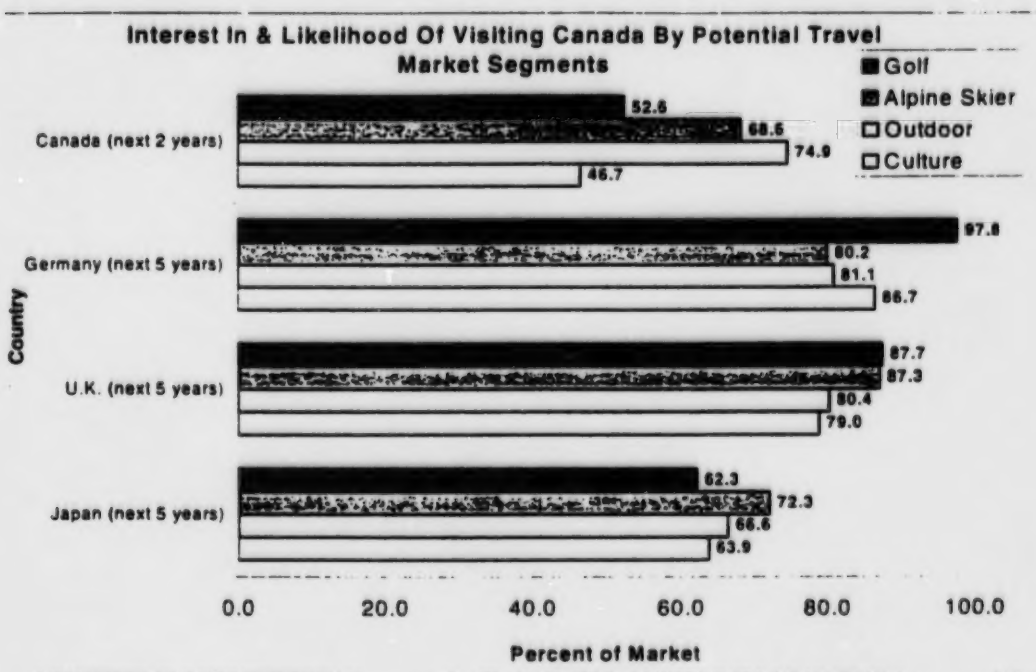
- In all of the international markets reviewed, general interest in cultural travel is far greater than that expressed for golf and alpine skiing. For instance, despite the recognised popularity of golf and skiing amongst Japanese travellers, trip interest level for these pursuits are much less than those associated with cultural tourism travel. In the Japanese market, the differences between golf (9%), alpine skiing (6%) and cultural tourism are

more pronounced than they are for any of the other international markets reviewed (Appendix 5).

- Amongst non-resident travellers to B.C., general interest levels in cultural tourism (51%) tend to be very similar to those expressed for outdoor travel experience (56%). No specific general interest information has been collected for golf or alpine skiing (Appendix 5).

- Canadian travellers expressed cultural tourism interest patterns similar to those of their international counterparts. General interest levels in cultural trips were regarded as being second only to outdoor travel (45%), and well ahead of interest in golf (8%) and alpine skiing (7%). Amongst B.C. residents, cultural tourism importance tended to be less pronounced (24%), when compared to interest in outdoor travel activities (55%). No data were available on general interest in golf and alpine skiing (Appendix 5).

Figure 9
Likelihood of Travelling in Canada by Travel Product Group



3.8.5 Comparisons of Canada and B.C Travel Likelihood For Cultural, Outdoors, Golf and Alpine Skiing Trips

- Stated levels of interest and likelihood of cultural travellers visiting Canada within a five year time span are quite strong (60+%) across most international markets. Indeed, cultural traveller affinity for Canadian destinations compares well with the travel intentions expressed by international travellers interested in outdoor, golf, and alpine skiing experiences. For instance, when compared to the overall affinity of outdoor, golf and alpine skiing travel enthusiasts for future travel to Canada, cultural travellers ranked second in the German, third in Japan, and fourth in the United Kingdom marketplaces (Appendix 5)

- Affinity for travel in Canada by Canadian cultural travellers is weaker than it is for international travellers. Only an estimated 47% of the Canadian market expressed an interest in travelling in Canada within a two-year time span (Appendix 5).

3.8.6 Comparisons of Trip Activity Incidence Levels amongst Cultural, Outdoor, Golf and Alpine Skiing Travel Markets

- While variations in levels of participation occur between activities and among international travel markets, often several cultural activities had trip incidence levels greater than those associated with some outdoor activities. For instance, the highest cultural activity incidence level (52%) in the Japanese travel market was associated with opportunities to enjoy ethnic culture[1] and festivals. In comparison, no outdoor travel activity had as high a reported incidence level (Appendix 5).

- Non-resident travellers who had visited BC exhibited similar cultural activity trip patterns to their more general international counterparts. For example, among non-resident visitors the most frequently cited (19%) cultural activity pursued while travelling was visiting art galleries, museums and exhibits. No outdoor trip activity pursued by these non-resident visitors had an incidence level that was higher than that associated with that cultural pursuit (Appendix 5).

- In all international travel markets, several cultural activities had trip incidence levels far greater than those associated with golf or alpine skiing. For

[1] It should be remembered that to the Japanese, ethnic culture could include North American culture as distinct from ethnic culture as North Americans would percieve it.

instance, while trip incidence levels associated with golf were highest (14%) in Germany, at least eight culturally-oriented activities had participation frequencies that exceeded golf's participation level. Similar patterns were apparent with respect to alpine skiing. The largest incidence of trip-related alpine skiing (3%) occurred with Japanese travellers. At least nine cultural pursuits had trip incidence levels which exceeded skiing's performance in this marketplace (Appendix 5).

- Among non-resident travellers who had visited BC, cultural tourism's activity incidence predominance over golf and skiing was repeated. Golfing (7%) and alpine skiing / snowboarding (9%) had lower trip incidence levels than visiting art galleries, museums, and exhibits in this marketplace (Appendix 5).

- The Canadian travel market exhibited someone similar patterns to the international marketplace, when cultural tourism activity was compared to other outdoor pursuits. For instance, enjoying ethnic/cultural events was cited most frequently (24%) as a trip activity by Canadian travellers. This incidence level was higher than that associated with all but one other outdoor activity (i.e. sunbathing and beach activities) investigated (Appendix 5).

- Among B.C. residents, visiting historic cites was the most frequently mentioned cultural travel activity (16%). This pursuit was only exceeded in incidence level by the outdoor trip activities of wildlife viewing (28%) and backpacking / hiking (21%). This pattern was even more evident when resident cultural tourism activity levels are compared with golfing (6%) and alpine skiing participation (4%) incidence levels (Appendix 5).

3.9 Current International Markets For Travel to BC.

Most of the preceding discussion centres on potential travel to Canada from various international markets. While the BC Visitor Study provides information on the overall visitor volume, to this point in time information has not been analysed on individual markets. In order to identify market potential, it is important to understand both the propensity to take a cultural trip as well as the size of the current market to BC. The following table provides information on the number of visitors to BC.

Table 10
BC International Visitor Volumes[2]

Market	1997 Total	1998 Total	% Change 97/98
US	3,094,395	3,405,853	10.1
Japan	309,529	279,636	- 15.4
Australia/NZ	114,093	112,756	- 1.2
United Kingdom	167,168	179,004	7.1
Germany	116,857	106,846	- 8.6

While there is considerable potential in the overseas markets based on the size of the markets (the potential number of travellers) and the interest in cultural travel, the US market is by far the largest international market for BC. Unfortunately, it is a market for which very little market information is available.

[2] Tourism BC - 1998 In Review

4 Innovative Cultural Tourism Models / Case Studies

4.1 Introduction

What has been suggested in previous studies, and is known in the tourism industry is that the better the cultural product the greater the likelihood that tourists will spend money within destination regions. Equally important is the role that cultural tourism resources can play in attracting and increasing the length of stay of longer-haul tourists.

Despite the many resources being used for cultural tourism in this province, the reality is that not every cultural asset that might be of interest to tourists in this province is willing or able to be a significant tourist attraction. Indeed, overall there is a continuum of cultural tourism enterprises ranging from those willing to attract tourists (but which have not made a serious commitment to do so); to those operations with products that are getting "ready" (i.e., have or are making the financial and human resource commitments needed to customise their facilities and services appropriately for the marketplace); to those cultural ventures that are "able' or have done so (i.e., those with the product and marketing strategies in place and operating). A key element in any cultural tourism strategy is to move more of those cultural attractions which have an interest in participating in the tourism industry from being "willing" to "ready" to "able."

An examination of successful cultural tourism initiatives in other locations suggests that fundamental to being ready or able to participate fully in this form of tourism, at least three underlying conditions must be met:

Community Support and Involvement: A supportive local community generates positive word of mouth, influences the choices of visiting friends and relatives, and offers services or products which complement, rather than conflict with, the cultural tourism experience and values of the marketplace.

Attraction Sustainability: Cultural tourism assets must be developed with the intent and ability to be sustained over time. Only a product which is in harmony with the community's values and aspirations to maintain it own heritage and environment, will be able to achieve this sustainability. A cultural tourism attraction, which is in conflict with these values and efforts, or supersedes them, will likely not achieve lasting success, nor will the attraction be likely to maintain financial sustainability.

Management Commitment and Capability: Before a cultural asset is able to draw tourists, it must become a part of the tourism agenda. Management commitment to that agenda includes initiatives such as developing a marketing plan, which

specifically targets key consumer markets, and directs financial and human resources towards customised customer communications, facilities and services.

The following case studies provide insight into a range of cultural tourism examples, which illustrate ways in which these principles have been used to create sustainable and synergistic partnerships among cultural and tourism organizations. While having their own developmental and managerial challenges, they have been chosen because of their potential relevance as models for BC's varying cultural tourism opportunities.

4.2 The Oregon Trail

Because of the often small and scattered character of many cultural and tourism activities, it is often difficult for individual organizations to generate the critical mass of market awareness needed to attract visitors on a sustained basis. One method of overcoming this challenge has been to strategically partner with other related organizations or ventures. Such partnerships can occur in a variety of ways including co-operative information collection, resource sharing, product packaging, promoting and advertising. In all of these instances, the focus is on using the combined talents and resources of individual organizations to create a more efficient, systematic and powerful means of gaining access to a viable position in the marketplace. However, the key to developing such relationships is to find a common theme or purpose around which potential partners can rally their collective resources and talents. In a tourism context, there are several instances where that common theme has been based on a region's cultural resources. Indeed, there are many examples of tourism destinations that have created well-defined market positions and product delivery systems built around cultural and heritage themes. Some of the more ambitious and successful initiatives of this type have been based on heritage trails. For example, Nova Scotia has successfully used its maritime heritage to create several regional-touring routes. In this regard, the province's Lighthouse and Evangeline Trails bring together the cultural and heritage resources of specific regions to inform the public about each area's unique heritage and cultural characteristics and to systematically create touring packages, designed to attract and hold visitors. Extending from mid-continent to North America's West Coast, the Oregon Trail has been created for similar purposes.

The Oregon Trail (more correctly, the Oregon-California Trail) generally follows the Platte River to its headwaters, and then crosses the mountains. In southern Idaho, the California Trail splits off (until this point, the Oregon Trail and the California Trail are one in the same). The Oregon Trail then follows the Snake River until it reaches the Columbia--which flows into the Pacific. This corridor formed the route along which literally hundreds of thousands of pioneer Americans migrated in their search for land and resources. Indeed the combined migrations, which tracked this Trail, have been described as "one of the ten most important events in American history, ranking right up there with the

Revolutionary War, Civil War and anything else you can name." It is truly unique in terms of the masses that travelled its course. It was the only practical corridor to the entire western United States.

Today, the Oregon Trail transports literally hundreds of thousands of tourists along the route from Missouri to Oregon. Along this corridor, travellers are treated to a wide array of well marked, promoted and frequented reminders of the history and heritage associated with the Trail's role in opening the western United States. In the state of Oregon alone, many reminders of state's history dot the landscape along this route. A full range of heritage sites, monuments and programs have been created and promoted in order to help visitors and residents alike share the experiences of Oregon Trail emigrants, Lewis & Clark explorers, and many others. These include initiatives related to identifying, mapping, and displaying an ever-expanding set of archaeological sites; historic buildings, churches, districts, houses, military installations, monuments, museums; and historic event re-enactments associated with the Lewis & Clark Expedition and the Oregon Trail's impressive past.

To support and promote the Oregon Trail's development and use by visitors and other publics, a full range of products and services have been developed. These include not only promotional print materials and maps, but also videos, books, audio tapes, games, movies, art, and teacher's guides depicting various Oregon Trail themes. The vast majority of these resources are available to visitors via designated merchandising outlets, gift shops and the Internet. As well, tourism-related accommodation, food and beverage, transportation, event and attraction facilities and programs are promoted in conjunction with the Oregon Trail heritage theme.

4.3 Colonial Williamsburg

BC is blessed with several very interesting and unique heritage sites. Beyond their immediate heritage value, many of these have both existing and potentially enhanced appeal for resident and non-resident travellers. Colonial Williamsburg represents one of the most dynamic examples of a destination which has used tourism to leverage its capability to restore and protect a region's key heritage resources while contributing to the area's economy.

Once the original home of the American drive for democracy and a catalyst to revolution, Colonial Williamsburg was literally restored from the ground up. Today it is a living and working town on 173 acres, with over 500 historic buildings, a folk art centre, a decorative arts gallery, an archaeology museum, 90 acres of formal gardens, and a plantation house on the James River. It provides a way for visitors to step back in time and experience first-hand life as it was in the 18th Century. It is also a testament to the contributions that dynamic partnerships between culture and tourism can create.

In 1926, John D. Rockefeller, Jr. undertook restoration of the colonial capital on a scale never before attempted in American history. Legions of architects, archaeologists, and historians worked with masses of data to bring Williamsburg's past to light. Their efforts led to the uncovering of old foundations, walls, and cellars. Buried fragments of marble, brick, hardware and tiles rendered authentic architectural and ornamental clues, which eventually culminated in the restoration of the community's physical structures and a recapturing of its social and economic fabric.

Today, the Historic Area of Colonial Williamsburg is both a museum and a living city. Many of the restored and reconstructed homes and outbuildings are residences for Colonial Williamsburg's employees, who work as actors, interpreters, carpenters, milliners, silversmiths, printers, tavern and inn operators, blacksmiths, artists and crafts people in the town's economy. Each year, visitors participate in the support of the non-profit Colonial Williamsburg Foundation by purchasing on-site tickets, lodging, meals, goods, and services. Profits generated from these purchases are reinvested in ongoing preservation, research, and education efforts. In this fashion, visitors help to ensure that other travellers will have opportunities to learn of the lives, legends, and lessons of Williamsburg.

Colonial Williamsburg's connections with tourism are significant. Every year it attracts more than 3 million paying visitors to its grounds and exhibits. It actively promotes the visits of these travellers through strategic alliances with travel industry partners who cater to the cultural tourism market. It also has developed a very user friendly web site which helps potential visitors develop full trip itineraries that include: pre-trip planning resources (e.g., things to see and do, hours of operation ticket prices; on-site activity options (e.g., calendars of events and attraction; places to tour, eat, meet, recreate and shop, interpretative activities); and post trip activities (e.g. purchases of books, audio and visual tapes, home furnishings, unique foods, as well as art and craft gifts). In this fashion, not only tourists but also local residents and the cultural community benefit from this innovative partnership between culture and tourism.

4.4 Rising Tides

Community-run festivals have evolved into an increasingly significant sector of the North American tourism industry. Common goals of such festivals include strengthening the local economy and infrastructure, enhancing or preserving local culture and history, and providing recreation opportunities for locals and in some cases visitors. BC has a myriad of such festivals and events scattered across its landscape. To create and sustain such festivals, most communities have to address a number of concerns. Depending on the context and location, these include issues related to festival funding, management, local leadership and expertise; local participation and resident attitudes; marketing; and strategic alliances with tourism stakeholder groups. The Rising Tides theatre festival in rural and coastal Newfoundland illustrates how a local performing arts event,

when combined with tourism, can be used to celebrate and strengthen local culture and economy.

Since its founding as a professional theatre company in 1978, Rising Tide Theatre in Newfoundland has created a diverse repertoire of plays as well as touring productions. These range from "rejuvenated classics" to plays that portray the landscape, culture, and character of Newfoundland and Labrador. Some of Newfoundland's finest playwrights, actors and designers are involved in the productions. In 1993, Rising Tide Theatre mounted "The New Founde Lande" in Trinity, a historical pageant celebrating the province's rich and diverse history through a series of dramatised vignettes. In the wake of its success, the pageant was expanded into the annual "Summer in the Bight Theatre Festival" in 1994.

The festival, held annually from July to September in Trinity and other small communities in the Trinity Bay area, has turned the region into one of Newfoundland's primary tourist destinations. In recent years, the event attracted capacity audiences of 20,000 to 30,000 people each summer. The festival features over 100 performances, including dinner theatre, concerts, and special events. The ten or more plays produced each summer are about the people's dependence on the land and their struggle for survival.

In an attempt to place episodes in the environment in which they originated, the shows are staged both indoors and outdoors at historic venues such as the community's parish hall or the back porch of a merchant's house. Performances are given in eight or nine different communities in Trinity Bay. The respective plays and the required settings largely dictate the choice of place.

Rising Tide Theatre relocated from St. John's to Trinity in the early 1990's in order to create a new industry in an area that was economically devastated by the closure of the cod fishery. The theatre was welcomed as a promising initiative to help build a new, long-term industry. Considering the lack of theatre infrastructure or an arts and culture centre in the area, the company's relocation and subsequent creation of a theatre festival were courageous undertakings.

Rising Tide Theatre has become a catalyst for local economic development, and provides locally about three full-time employees and up to 12 part-time employees during the winter. During the summer season, approximately 45 people are involved in the festival production, more than half of whom are local residents. Although many of Rising Tide's employees are seasonal workers, this employment provides financial assistance during the winter months, when job opportunities in the former fishing villages are very limited. An expansion of theatre activities into the winter season, presently contemplated by Rising Tide, promises to further extend local employment opportunities.

The mounting of "The New Founde Lande" pageant, now part of the larger festival, was supported by Human Resources Development Canada (HRDC). HRDC funded a training program for local residents--many of whom were unemployed fishermen--who wanted to become part of the production. Training was provided in acting, design, technical operations, and box office organization and business management. One remarkable aspect of the festival is the fact that Rising Tide Theatre integrated newly-trained people with no previous experience in the performing arts into a professional theatre company. From the very beginning the concept was to unite the professional company and its expertise, finances and resources with the people of the existing community. Between 20 and 25 people, who remained with the company, were trained for this program. In addition to jobs, they acquired marketable skills and experience. Recruiting local residents interested in theatre production was not an easy undertaking at the onset of the project. However, with the project's success more people are applying for jobs than Rising Tide can accommodate.

In addition to these direct economic effects of newly created jobs, it is important to emphasise the indirect economic spin-offs generated by the festival. Numerous local businesses have been expanded or newly-developed since the inception of the Summer in the Bight Theatre Festival. Although the increase in local business activity may not be solely attributable to the festival, the event undoubtedly plays a leading role in this regard. For example, Trinity and vicinity only offered five accommodation facilities at the onset of Rising Tide's performances, while the area now provides 18 such facilities. In addition to some hotels and housekeeping units, these are mostly locally-owned bed and breakfast operations. Five restaurants and a marina as well as several craft stores in Trinity have also opened or expanded their businesses over the last few years owing to the increased influx of visitors.

Local resources are utilised for the festival wherever possible. All supplies that are available locally are purchased at the convenience store, or from caterers or electrical supply shops. As a result of the employment and revenues generated by the tourism industry, fewer young people leave Trinity than other small towns in Newfoundland. Trinity is now on the tourist map and comes alive in summer.

In this regard, the Theatre Company is now exploring how to effectively increase its tourism marketing. The company and community have developed their own Internet sites and are also referenced on the website of the regional tourism association. However, more ambitious efforts are underway to integrate the festival into a larger tourism experience that offers additional products and services in the area. Trinity Bay may become part of a tourism package that offers a number of unique attractions for which the festival will be the anchor event. It is that hoped that the length-of-stay of festival visitors can be increased by develcping packages that include other "package components" such as boat-rides, wildlife and whale-watching excursions and nature walks around the Bonavista Peninsula, along with visits to the area's nearby national park.

Co-operation between local businesses and communities and the Theatre Company is essential for a successful and enduring event. In this regard, there are numerous examples of collaboration between the town council and the Theatre Company. These include partnerships involving the use of outdoor space and buildings for performances as well as parking facilities and some road closures during the event. Local entrepreneurs are also involved in catering for dinner theatres, providing transportation by boat to the festival, and supplying much-needed accommodation for festival attendees and employees.

Although the "Summer in the Bight Festival" cannot solve all economic hardships in the Trinity Bay area, it has linked culture and tourism in ways which have positively changed the lives of many people, and helped the community in its struggle to survive.

4.5 Wanuskewin Heritage Park

(Note: Although aboriginal tourism is a separate product line and is not specifically included in this report's definition of "cultural tourism," the following example is given because of the growing interest importance of First Nations culture in BC, the rising market demand and the need to incorporate First Nations tourism into an overall cultural tourism strategy over the coming months.)

In many parts of North America, much focus is being placed on the development of cultural tourism which incorporates aboriginal components. However, linking tourism interests and aboriginal culture is not always an easy marriage. Wanuskewin Heritage Park in Saskatchewan illustrates how respect for contemporary First Nation's knowledge can be balanced with the need for important strategic partnerships in the day-to-day management of both ancient and living heritage.

The 116-hectare Wanuskewin Heritage Park is located 5 kilometres north of Saskatoon, Saskatchewan, near the confluence of the Saskatchewan River and Opimahaw Creek. It is a place where the Northern Plains Indians "visited on a regular basis for over 6,000 years." Findings indicate that pre-contact Indians "came here to hunt, to gather food and herbs, to escape the winter winds, and to meet others in worship and in celebration."

At Wanuskewin, respect for Plains First Nations' traditions and the ancient archaeological heritage has remained paramount while the park has grown into the province's most-visited tourism attraction. The operations at Wanuskewin's award-winning visitor centre have largely been responsible for the park's local and international popularity.

Two Boards of Directors currently govern the park. One is composed of Native Elders, the other involves both Native and non-native funders. The Wanuskewin

Heritage Park Corporation is a charitable, non-profit organization consisting of 13 partnership directors from the city, provincial and federal governments, university, non-profit agencies and donors. The other board, Wanuskewin Indian Heritage Incorporated (WIHI), presently has 13 representatives from Saskatchewan's five tribal nations who provide cultural and spiritual leadership.

The Park Corporation remains the more pragmatic and finance-driven of the two entities. While the Park Corporation has been responsible for implementing many initial developments, key decisions are increasingly being devolved to the WIHI Board. This illustrates the increasing experience as well as the symbolic importance attached by all partners to aboriginal decision-making. Both boards are presently linked through their chairpersons, who serve as cross-appointed vice-chairs on each other's boards. The Executive Director—the lead staff manager—serves both the Park Corporation and the WIHI board.

Lands in the park are considered one of the most concentrated, least- disturbed Native archaeological repositories in North America, and the most significant for Plains Indians artefacts. At least 21 locations at the Park site are identified as having significant findings. The ongoing archaeological activities have become a part of the distinct visitor experience at Wanuskewin. Even though the finds are considered sacred by the First Nations, user-friendly, interactive laboratories and outdoor archaeological digs have been made highly accessible to visitors and volunteers.

Cultural education plays an important role at Wanuskewin. Programming direction is typically solicited from Elders. Native hosts exclusively guide visitors and organise a wide range of artistic and sporting events related to the area's cultural heritage. Regular celebrations such as seasonal pow-wow dances, the 'Tawaw' summer arts festival, a winter gathering, 'Aboriginal Awareness Seminars' and 'Aboriginal Speaker's Dinners' are used to affirm and promote First Nations culture.

Of particular importance to the tourism industry, Wanuskewin has used its $10.5 million in leveraged private and public resources to develop a first class visitor centre. This facility has served as a hub for a wide range of education, training, cultural and entrepreneurial activities. Current management also believes that Native culture has a lot to teach non-native individuals. In this regard, the centre has helped to spur the development of a package of nationally-recognised training seminars and courses targeted to help business and government leaders better understand First Nations culture. As well, up to 60 Native and non-native university students have been employed at the Park and its visitor during the summer seasons. Public school programs—such as overnight tipi trips, crafts, archaeology and mock bison hunts, along with musical and other performances—have become popular ways for creating bonds between Native and non-native residents at Wanuskewin.

Currently Wanuskewin attracts about 30,000 out-of-province visitors annually, with about a third from international locations. However, its share of these international visitors has not expanded in recent years. As a result, a proposal seeking 'World Heritage Site' status for Wanuskewin has been developed. If successful, this special status is expected to help build the Park's international drawing power.

4.6 The Shaw Festival

Few places in Canada can match Niagara-on-the-Lake for revitalizing and enhancing a community through initiatives in the performing arts and heritage preservation. As the original capital of Upper Canada, the old town, which is located in Southern Ontario, is still alive with heritage of a bygone era. Early 19th-century homes and picturesque local streetscapes have been meticulously restored and maintained. The community has been recognized with numerous awards for the quality of its heritage architecture, lush gardens, and innovative combination of rural and urban landscaping. Fifteen of Canada's finest wineries are connected to the community via a well-marked "Wine Route" and guided tours.

The town is home to many heritage sites and historical monuments including: Fort George, Navy Hall, Queenston Heights, Brock's Monument, The Mackenzie Printery (Canada's largest operating heritage printing museum), the Niagara Society Museum (one of the oldest and most complete of its kind in Canada), and the Niagara Apothecary. Plaques and markers commemorating important historical events and heritage buildings can be found throughout the region. Several of the community's heritage buildings have become galleries for various permanent and touring visual art exhibitions. Visitors to the community can take a self-guided walking tour to many of the exhibits displayed at the community's heritage sites.

However, what has provided a significant amount of community and economic vitality as well as unique tourism market positioning is the world renowned Shaw Festival with its three performing arts theatres. As the second largest repertory theatre in North America, and the only one specializing in plays written by George Bernard Shaw, the Shaw Festival draws hundreds of thousands of visitors to its theatres and the community from April to October every year. Each theatre has its own design characteristics and provides a unique viewing experience.

For instance, the Festival Theatre (861 seats) is the flagship stage for the festival. It provides a venue for plays that need size and larger scale. The Court House Theatre (316 seats), the most intimate of the stages, offers audiences and actors opportunities to interact. The Royal George Theatre (328 seats) provides opportunities for the more accessible plays related to musicals and mysteries.

Through a combination of innovative memberships, well-developed sponsorships, strategic partnerships, and targeted tourism marketing initiatives the Shaw Festival stands out. It is able to draw Canadian and international spectators to its performances on a sustained basis for longer periods of time than most of its counterparts. To achieve this performance the Shaw Festival works closely with its many tourism partners to develop and jointly promote bundles of experiences, which meet the needs of specific travel markets. For instance, in the group travel market, it offers groups of 20 or more people substantial discounts, special services and packages which combine theatre, accommodations, dining and tours. For school groups, it provides low student prices for "Special Matinees," as well as educational resource kits and special learning opportunities. All of these programs can be ordered directly on line.

Many other theatre and repertory performing arts festivals exist in North America. These include various Shakespearean festivals in such places as Alabama, California, Colorado, Florida, Georgia, Illinois, Kansas, Oregon, Pennsylvania, South Carolina, Texas, Utah, Maine, Massachusetts, New Jersey, New Mexico, as well as Stratford, Vancouver and Victoria in Canada.

In many respects the Shaw Festival stands out from these counterparts because of the partnerships it has formed with tourism stakeholders. From its very early days, the festival's organizers have forged strong alliances with the tourism industry and local community in developing particularly innovative cultural tourism experiences.

As a consequence the festival is closely integrated into a cultural resource which benefits Niagara–on- the-Lake, tourism stakeholders and the performing arts community. These benefits continue to expand as the Shaw Festival grows in stature for cultural travelers and importance to the region's arts community.

5 Issues and Opportunities

5.1 Issues

1. *Many organizations in the cultural and heritage sector are uncertain about the costs and benefits of tourism.* Almost any organization would like to see attendance increase, and many organizations see tourists as a potential audience. However, there are both direct and indirect costs to attracting tourists. It will require an investment to attract tourists, ranging from signage to brochures and to having a box office open on a regular basis. In addition, organizations will need to consider whether the experience they have to offer will meet the needs of tourists. This may require some compromise on the part of some organizations – for example, with respect to how they present their product versus what they might be trying to protect.

2. *Culture and heritage are not commonly recognised by the tourism industry as a "product line."* The tourism product in BC has developed largely around the spectacular physical attributes of the province. Tourism became a more important industry in BC in the 1950's and 60's with the growth in automobile ownership and the construction of a highway network around the province. This is the origin of the large "touring" product which includes attractions and accommodation properties throughout the province. Later, the development of the ski industry, campgrounds, outdoor activities and wilderness lodges created the outdoor product that BC is now recognised for. Unlike other destinations, such as the UK, the cultural and heritage sector has not been strong enough to play a significant role in marketing by the tourism industry in BC.

3. *The primary beneficiary of an enhanced cultural and heritage product is not culture and heritage organizations, but the tourism industry.* The BC tourism industry has benefited from having a "free" product to sell – our scenic outdoor environment. The nature of visitor expenditures is such that visitors attracted by culture and heritage products will spend far more on the tourism component of a trip (accommodation, transportation, food and beverage, other attractions) than on the heritage and cultural component. However, the financial responsibility for product development in the cultural and heritage sector has resided entirely within this sector and the development and maintenance of the quality of product required is expensive.

4. *The cultural and heritage sector is not well-integrated into the tourism infrastructure.* The sector has largely developed on its own with a resident or regional market for its activities. By meeting local demand for its programs or activities, there is little need to do extensive marketing to tourists. In some cases, market-ready cultural and heritage organizations participate in regional tourism association programs and take part in marketing activities. However, this is generally not the case.

5. *There is a lack of information about the market demand for cultural and heritage products.* The market demand for cultural and heritage tourism products is substantial. Beyond the international studies, there is minimal information about the motivations of tourists to take part in cultural and heritage activities or in what they seek from the experience. The research also shows that there is a substantial gap between interest and purchase. Whether this is due to a lack of supply of the cultural and heritage product, lack of information or lack of sufficient quality is not known. In particular, there is very little information on the key US market.

6. *There is an "open the doors and they will come" syndrome in the culture and heritage sector.* Many organizations (and tourism operators, for that matter) have considerable experience in developing or operating their product, or the type of experience they are developing. Most museum curators understand

how to preserve and present their collections and excel at this and other similar functions. However, it takes an understanding of marketing to develop and present a product (or a collection) that will appeal to tourists and visitors in general. What is of great interest to the person developing the collection or experience may not be of interest to the person purchasing the experience.

7. *There is only superficial information available on the culture and heritage sector.* The database and classification system developed for this report provides information only on the number of sites or organizations and their location. What is of importance in identifying opportunities is a measure of the quality of the experience that can be provided to tourists. In addition, there will be a difference in the rate of return on investment in culture and heritage product development and marketing depending on the attractiveness of the product and the amount that it can be sold for.

8. *There may be a lack of tourism marketing expertise within the culture and heritage sector.* As identified above, few cultural organizations have marketing staff, and fewer have marketing staff with an understanding of tourism marketing. Tourists may be considered part of an overall audience mix and in many cases may not need to be serviced much differently than a resident (i.e. a tourist buying a ticket to a museum may have the same interests as a local resident). The tourism industry, however, has a delivery mechanism and marketing opportunities which are different from those found within a community marketing experience.

9. *Culture and tourism organizations and staff have different mandates.* Culture and heritage organizations have mandates that focus on preserving and presenting the culture and heritage of their community or region or in presenting the arts to their community. In many cases, they appeal to a specific audience in the local community. Generally, they are non-profit organizations with limited resources. Tourism organizations are generally profit-making and measure their success and impact in terms of their bottom lines. The investment required is often substantial and many tourism operators are large employers. This requires them to generate a return on investment which is substantial enough to keep the business viable. Marketing is a necessity in order to attract new customers and these operators are constantly striving to expand their market reach. These differences in mandate and motivation can create barriers to partnerships.

10. *Most cultural and heritage organizations have limited budgets.* Most organizations operate within their communities meeting local demand. With limited municipal and provincial government assistance, they do not have the resources to enhance their product or to take part in marketing programs intended to increase tourism traffic to their region or to their events or facilities. Only the largest professional organizations have marketing budgets that enable them to participate in tourism marketing campaigns.

11. *The Royal BC Museum and the heritage sites such as Barkerville represent some of the best heritage experiences available in the Province.* At the same time, long-term government financial constraints have limited their ability to fulfil their key mandate to maintain their collections and facilities.

5.2 Opportunities

1. *There is a well-developed cultural sector in BC.* Cultural and heritage organizations exist throughout BC that meet local needs. In some cases, these organizations also appeal to and actively market to tourists visiting the community or region. These organizations form a base upon which to build a cultural tourism product that can more actively promote themselves to tourists and help draw new markets to communities and to regions. Many communities are now recognising the potential of their local organizations and are expressing interest in developing them as part of their tourism industry.

2. *There are a number of provincial government run (RBCM, Barkerville etc.) operations that offer a quality, authentic experience and in the past have worked successfully within the tourism industry.* These can serve as focal points for regional development and may help to bring other cultural and heritage organizations in the region into co-operative marketing activities.

3. *The two "block-buster" exhibits undertaken at the RBCM show the potential of culture and heritage tourism.* The Visitor Study conducted by the RBCM at the da Vinci Exhibit identifies that it is possible to draw incremental tourists for culture and heritage. The exhibit generated 135,000 incremental overnight visits to Victoria and 60,000 day trips (i.e.tourists came specifically to see the exhibit).

4. *There is considerable recognition in the international tourism marketplace of the uniqueness of the First Nations culture in BC.* The First Nations culture in BC is unique and offers considerable potential for further development and marketing. While the primary role for enhancement of First Nations tourism opportunities is being assumed by other organizations, a linkage between First Nations culture and other BC tourism and government initiatives is important to strengthen opportunities for all stakeholders. The interaction between early settlement and First Nations could serve as a theme for development.

5. *Some product development work has been undertaken on the Gold Rush Trail.* This represents a potential development opportunity that could be marketed more significantly. The Gold Rush Trail from Fort Langley to Barkerville was the subject of some tourism development activities following

the completion of the Coquihalla Highway in 1986 and was promoted in a limited way for several years. The Trail links a number of historic sites and runs through very scenic areas and could play a stronger role in promoting BC's heritage. Recently the Cariboo Gold Rush Trail Action Alliance commenced the development of a marketing plan for the Trail.

6. *The historic Alaska Highway is well known in the US market and offers strong appeal to a specific market segment.* Indeed, the Alaska Highway holds an almost mythical appeal to many North Americans. This is based perhaps on the attraction of the Yukon and Alaska as two of the few "exotic" wilderness destinations that can be accessed by road, the memory of thousands who were involved in its construction, or the word-of-mouth and magazine articles that promoted it. While there has been tourism marketing of the Highway in co-operation with Alaska and the Yukon, there are additional opportunities to capitalise on its appeal and link it with other BC regions.

7. *Kelowna has made substantial investments in their cultural infrastructure.* The City of Kelowna has made considerable progress towards the development of a cultural district with a new library, theatre, art gallery and multipurpose centre that will provide the community with the infrastructure required to develop a marketable cultural product.

8. *Vancouver, Victoria and other major cities have high quality professional performing and visual arts organizations.* The larger urban centres in BC have developed very good quality professional performing and visual arts organizations, some of which are competitive with any in North America. Efforts are underway in some cities to bring these organizations together in tourism-oriented marketing programs, but the product is ready.

9. *Vancouver has an international image as an attractive, cosmopolitan city.* Expo 86, other events, immigration and Vancouver's growth as a financial and transportation centre have strengthened its image as a vibrant city with a strong multi-cultural flavour. Vancouver is working to strengthen its cultural and entertainment product and enhance its image as an entertainment centre based largely on performing arts and sport events. There are other cultural and heritage opportunities that can be added to the product mix such as heritage sites and attractions.

10. *BC has produced internationally renowned artists.* Including Robert Bateman, Jack Hodgson, Sarah McLaughlin, David Foster, Brian Adams, Michael J. Fox and Ben Heppner, to name just a few, BC has produced artists that help build an image of the province as a place where culture flourishes.

11. *Market data demonstrates that there is strong interest in all markets in the cultural and heritage sector.* Between 25% and 50% of the major travel markets say that culture and history are important to them in choosing travel

destinations. Over 50% of visitors to BC (about half of whom are US residents) say that historic sites and cultural attractions are important to them in selecting BC as a destination.

12. *There is a large gap between interest in culture and heritage and participation.* In comparison to the high interest levels, in some cases a much smaller percentage (ranging from 4% to 19%) of visitors to BC actually take part in cultural activities or visit historic sites on their trip to BC. The gap between interest and purchase represents an unfulfilled opportunity to increase participation among current visitors to the Province.

13. *The arts and tourism organizations under development in Vancouver, Kelowna and Victoria represent opportunities to build models for other communities to use in developing the linkages between culture and tourism.* The work underway and lessons learned in these communities can be adapted for use in other communities in the province to build the linkages between culture, heritage and tourism. In addition, these organizations may soon have packages that can be marketed at a provincial scale.

14. *With additional analysis, the Tourism BC Visitor Study will yield much needed product development and marketing information.* While beyond the purview of this project, the initial analysis undertaken here suggests that it is possible to develop clear segments of the culture and heritage travel market for BC. This would be invaluable in helping to better understand the type of tourists attracted to culture and heritage and their motivations for participation.

5.3 Market-Ready Cultural and Heritage Organizations

The term "market-ready" is used in the tourism industry to identify tourism product groupings or individual product operators that are ready to be sold to a tourism market. The definition, or criteria used to evaluate the status of a sector varies by product, but usually incorporates an aspect of "quality" and one of "marketability." Following are criteria which can be used to assess the degree of "market readiness" of the cultural and heritage sector.

AUTHENTICITY/UNIQUENESS

The experience reflects the culture or history of BC, is unique to BC or represents an experience that is of sufficiently high standards to appeal to a tourism audience.

MARKETABLE

The organization in interested in offering its product to tourists and is capable of participating in co-operative marketing programs. It has a marketing budget and a management structure that allows marketing decisions to be made. The operation already has a strong local or regional marketing program in place and may market to tourists locally.

PACKAGEABLE

The organization has administrative systems that allow it be included in tourism packages (i.e. advance ticketing and pricing, reservations) sold either directly to consumers or through the travel trade. The site or organization also has to be accessible to tourists and possibly tour buses.

QUALITY EXPERIENCE

The experience is presented in a professional manner that leaves the audience/customer satisfied with the experience.

It is recognised that there are currently a limited number of cultural and heritage operations in BC that meet all of these criteria. There are many more that are close to meeting these criteria but are not yet ready -- more frequently for management reasons than for the quality of the experience.

This suggests that in practical terms, there are three categories of "market-ready" cultural and heritage operations in BC.

1. **Market-ready** – meet all of the above criteria.
2. **"Near" Market-ready** – can easily meet all of the criteria, usually with some adjustments to operating, management or administrative procedures. The quality and authenticity of the experience is usually at a suitable level. A lack of budget to undertake marketing programs to tourists may be an issue.
3. **Not Market-Ready** – not able to meet the criteria for either authenticity or the quality of the experience, or have no desire to market themselves in tourism markets.

Each of the three categories contributes differently to the cultural and heritage image and marketability of the province. Each also has different needs in becoming market-ready.

1. Market-Ready organizations can be developed to represent "icons" for the sector that can be marketed immediately. These organizations are already marketing and have the infrastructure and administrative systems necessary. In most cases, these organizations need assistance to expand their marketing capability.
2. Near market-ready organizations generally would like to improve their marketing to tourists, but are uncertain about how to get started, or lack the resources necessary to make the required changes. Near market-ready organizations will need information, management assistance and in some cases financial assistance particularly to undertake marketing. In some cases, access may be an issue.
3. Those organizations that are not market-ready probably already meet an existing demand from the community or region and are not really interested in developing their organization or product to meet the needs of tourists. However, the vast range of these organizations helps to create an overall cultural and heritage image for the province and help to make communities more interesting places to visit for tourists.

At the present time, it is not possible to specify which of the over 2,000 organizations listed are market-ready or near market-ready. However, there are a number of organizations that can clearly be identified as market-ready as they are already functioning in this manner.

6 The BC Model

6.1 Product Market Gaps

Section 2.1 identifies a considerable number of culture and heritage organizations, events, facilities and sites in British Columbia. These are reasonably distributed in all regions of the province (given population differences) and include organizations in all of the classifications identified. Museums of various types represent the largest component at 32% (with most of these art museums and galleries), with another 22% representing Heritage sites and centres. In terms of the number of historic organizations, sites and museums, there are enough in each of the regions to provide a sufficient mass for marketing purposes.

There are 472 Festivals of varying types identified in the product inventory, with half of these identified as "community" festivals. Most of the balance are performing arts festivals. There are a sufficient number of festivals in each region (except perhaps in the Cariboo) to provide the mass required for marketing.

Classifications which have the lowest representation in the product mix are performing arts organizations and facilities. There are only 33 music organizations/facilities, with over half of these in the Vancouver Coast region. Of these 33, about one-third represent "professional" performing organizations such as symphonies and opera companies.

There are more Theatre/Dance organizations and facilities (82) but again, over half are in the Vancouver Coast region. About two-thirds of the listings appear to be facilities rather than organizations which suggests that the number of performing arts organizations in the province are relatively small in number.

With the exception of performing arts organizations, there appears to be a sufficient supply of culture and heritage organizations and facilities in nearly all of the regions of the province. However, the degree to which these are 'market-ready' is not known. This makes it difficult at this point in time to identify product gaps, given the need for a measure of the quality and marketability of the experience.

Data from the various travel market studies (referenced in Section 3 and found in Appendix 5) can be summarised to identify the kinds of cultural activities for which there is market demand in long haul trips. The top 3 cultural activities that

take place on long haul trips(1) are "enjoying ethnic culture and events," "visiting museums and galleries" and "visiting places of historical interest". The second tier of popular activities includes "arts and cultural attractions", "visiting places of religious significance" and "local crafts and handiwork."

Table 10
Activity Participation on Long Haul Trips

MARKET SIZE	Japan	UK	Germany	Canada	US
Number of Long Haul Pleasure Travellers (Size of the Market)	24,779,000	13,526,000	18,077,000	16,225,000	Not available
ACTIVITY	Japan	UK	Germany	Canada	Attractiveness Rating
Enjoying ethnic culture/events	52.2	53.5	61.4	23.8	1 (tie)
Visiting museums/galleries	42.9	45.2	47.4		1 (tie)
Visiting place with religious significance	34.7	32	36.9	14.6	6
Local crafts and handiwork	33.4	59.3	58.2	21.3	3
Visiting places of historical interest	32.5	50.6	34.1		4
Arts & cultural attractions	19.7	29.8	48.8		5
Visiting places of archaeological interest	15.2	24.8		8.1	8 (tie)
Visiting sites commemorating important people	13.6	27.1	15.3	10.1	8 (tie)
Visiting historical military sites		17.2	5.9	6.1	10
Attending local festivals/fairs/other special events	11	38.1	34		7

It is difficult to assess any product/market gaps using the Resource Mix (found in Section 2) and this market demand data due to differences in terminology. The top rated activity participated in on long haul trips ("enjoying ethnic culture/events") could be met by several classifications. "Visiting museums and galleries" is more specific and it would appear that with 525 museums and galleries in BC, there are likely a sufficient number of facilities to meet this demand. However, this does not take into account whether there are a sufficient number of "market-ready" facilities.

[1] These are activities that were taken part in on the most recent trip to any destination. Note that this data does not include the US; unfortunately there is no comparable U.S. data.

Nevertheless, there are some general observations that can be made. The demand for festivals and events is much stronger for "ethnic culture" events than for "attending local festivals/fairs." While it is impossible to tell from the resource mix how many of the community or special interest festivals relate to the "ethnic culture" of BC, it would appear that the ethnic strengths of BC should be a stronger feature of festivals and events in the Province, if these festivals wish to appeal to a tourism market.

There appear to be a number of different aspects to interest in historical sites. Market demand exists for religious, archaeological, military and "important people" sites and attractions in addition to historical sites. Again, the classification system does not readily lend itself to analysis by these descriptors, but this does suggest that in terms of marketing, consideration should be given to ensuring that there is a mix of sites of interest.

Also of significance is the strong interest in "local crafts and handiwork." The number of craft or art fairs or studios is relatively small in the inventory (although others may exist that are not included). Other work referenced in this report suggests that authenticity is important to culture and heritage travellers, and the use of the word "local" reinforces the concept that what is of interest to the market are BC-produced materials.

6.2 Strategic Directions

The following strategic directions are intended to serve as the basis for discussion concerning the development of marketing and product development strategies. They will guide the long-term direction and strategies required for the development of the culture and heritage tourism sector.

Organization

- The tourism industry, working with the Ministry of Small Business, Tourism and Culture and Tourism BC, are encouraged to expand their vision for tourism in BC to include more of the culture and heritage resources required to contribute to the strength and diversity of the provincial tourism industry.

- The heritage sector are encouraged to move beyond their mandate to preserve, exhibit and educate to consider how they can offer authentic experiences that entertain and inform visitors. To a large extent festivals and events and the performing and visual arts sectors already operate with a mandate that includes entertaining and informing visitors.

- Culture and heritage organizations that have the desire and capability to participate in tourism will need to ensure that the quality of their product and their management resources have the capability to meet the needs of tourists. They will also need to work more closely with the tourism industry. Cultural

tourism can only be successful if the product meets the necessary standards. This may require some investment, along with an investment in marketing.

- Market-ready organizations can take the initiative to form their own "network" to assist in developing co-operative marketing opportunities both regionally and provincially. This network (or consortium) could include First Nations products. Several examples of such "sector" marketing consortiums (e.g. Canada West Ski Consortium, BC Guest Ranch Operators) exist to serve as models for such a development.

- The development of arts/culture/heritage and tourism organizations in Vancouver, Victoria and Kelowna can serve as models for community organization development in other urban and rural regions. In addition, their activities should result in marketable products that may be able to marketed by the province.

- The Cultural and Heritage Tourism Sub-Committee of the CTC will be developing national strategies that BC should play an active role in. BC representatives on the Committee can play a continuing role in the development of strategies and actions in BC so as to play a co-ordinating role between the CTC and activities undertaken in BC.

Product Development

- The identification of 'market-ready' organizations, sites and facilities is critical to the success of culture and heritage tourism. Without a sufficient supply of organizations at this level of development, it is not possible to undertake marketing programs. To some extent, the process may be self-selecting — i.e. those organizations that are able to participate in marketing programs from a financial perspective are likely already market-ready. Further analysis will be required to identify those organizations that are both market-ready now, and those that are 'near market-ready'.

- The number of market-ready BC cultural and heritage resources will probably need to be increased in order to meet market demand. At the same time, they must not be compromised in their ability to represent the authenticity that tourists and local residents are looking for, nor should local support be destroyed in the process of becoming more "commercial."

- A mechanism needs to be identified which encourages the tourism industry to financially participate in the development of market-ready culture and heritage products that can then be marketed to increase the size of the market for BC. Currently the onus for product development of culture and heritage is placed on that sector, while the primary benefits of any development will be seen by the tourism industry. Any potential investment in the sector should be

assessed against the potential return on the investment, based on the quality of the experience and the potential revenues.

- Those organizations that are near market-ready need assistance to get their product ready to market. They will require assistance to do this, but the primary need will be for information and education on how to become market-ready.

- A "Made in BC" program for art, crafts and handiwork should be examined for the feasibility to register BC artists and artisans, affix labels to products, develop point-of-sale materials and promote the program generically.

- Festivals and events representing all the different culture and heritage classifications represent an opportunity to develop new culture and heritage tourism products. However, festivals and events within regions will need to work together on a co-operative basis and to be packaged in way that allows them to be marketed and sold to tourists.

- "Blockbuster" (or hallmark) events can serve as the foundation for building culture and heritage tourism both provincially and regionally. For maximum long-term impact, other sectors of the culture and heritage sector in a community need to be involved to offer tourists additional thematic opportunities to experience.

- There are at least two possible approaches to the development of regional themes. One is based on routes or trails. Examples of this type of region include the Gold Rush Trail and the Alaska Highway. A second approach is based on authentic regional experiences. Examples of this approach could include the ranching/"cowboy" heritage in the Cariboo, the early settlement and interaction with aboriginal bands on Vancouver Island and the Chemainus murals.

- The federal and provincial heritage sites and museums in the province have the benefit of greater marketing exposure, organizational support and product development. These sites can serve as "nodes" for development (or as feature sites) that can anchor regional groupings or trails. An example of this is the Gold Rush Trail, using Fort Langley as a starting point and Prince George as an end point, with nodes at Kilby, Lillooet, Ashcroft, Likely/Horsefly and Barkerville/Bowron Lake.

- Many communities are either currently involved in or exploring the development of their culture and heritage tourism product. Information contained in this report, the CTC Packaging the Potential report, and reports and plans prepared by other communities in the Province could be packaged or assembled to provide some initial resource material assistance to

communities. Access to the documents via a website may be the easiest channel to provide ongoing resource information.

Marketing

- With the gap in many markets between the percentage who say they are interested in culture and heritage, and the percentage of those who actually "purchase" the product, short-term marketing strategies should focus on ensuring that current visitors to BC have the opportunity to purchase the cultural and heritage product.

- The percentage of visitors who purchase culture and heritage experiences will increase closer to the potential size of the market if the sector is marketed successfully. In the longer term, marketing strategies should change to attract new visitors to the province who are interested in culture and heritage.

- Generally, market-ready cultural organizations need assistance to develop their marketing plans and find the resources necessary to implement marketing activities in co-operation with the tourism industry. While some direct government assistance may be required in the development of marketing co-operatives, the primary need will be for co-operative marketing programs.

- While some new market research is provided in this report, additional research is required to support the development of individual, regional and provincial marketing programs. Initially, further analysis can be completed on the BC Visitor and Resident Studies. In the longer term, visitor surveys can be undertaken at a range of culture and heritage sites and events to develop a more complete profile of the culture and heritage segments of the tourism market.

- The marketing of culture and heritage should be organised on a regional basis in order to provide a sufficient number of organizations within a geographic area to co-operate in marketing as well as to provide a sufficient number to attract tourists to a region. These regional groups could be organised on a regional tourism association basis but should have a theme that ties them together. These themes will need to be carefully considered on a regional basis, but also be developed within an overall provincial strategic context.

- Those organizations that are not market-ready should be encouraged to ensure that they are at least listed with local visitor information centres and regional tourism associations and to have basic information available for distribution. This will lead to some increased visitation from tourists and will also serve to enhance the overall image of BC as a cultural and heritage

destination. It will also strengthen the community or region's tourism product and give tourists more reasons to visit or stay in a community.

6.3 Needs Analysis

In order to increase the importance of the culture and heritage sector to tourism and to bring the benefits of tourism to culture and heritage, a number of actions are needed. Based on an analysis of the issues, opportunities, market potential and the strategic directions, the following will need to happen:

1. Better information will need to be developed on both the nature of the market demand for culture and heritage tourism as well as the quality and potential for return on investment of the culture and heritage product.

2. Development of the potential of the sector can begin fairly quickly through a marketing consortium of market-ready products. This consortium can develop their own marketing plan, provide input into tourism marketing plans and lever provincial and federal government funding.

3. There are a large number of cultural organizations that are currently attracting some tourists already in their communities. These organizations can be provided with materials and assistance to allow them to identify whether or not they should further enhance their product for tourism and what actions are required for them do so. This will also stimulate discussion within communities or regions as to the costs and benefits and help to build linkages between organizations.

4. The tourism industry needs to examine the nature of the product they are currently selling and the market potential of culture and heritage. This should lead to an investment in the development of the culture and heritage product and incorporation of the sector into tourism marketing.

5. The potential for bringing communities and regions together under a unique culture or heritage theme needs to be examined provincially. There are several projects which can be undertaken as pilot projects to explore how these are best developed and marketed.

6. BC culture and heritage products need to be better identified within the province and made available for sale to tourists visiting the province. This can occur within provincial or regional marketing materials or through specific programs.

7. There needs to be more discussion and liaison between the three sectors (culture, heritage and tourism) at a provincial, regional and community level. This should lead to a better understanding of the mandates, issues and opportunities in each sector.

6.4 Short-Term Options for Development

These short-term options have been identified to stimulate interest in culture and heritage tourism, demonstrate the potential and develop models for action in the short term with minimal resource investment. There are currently initiatives underway in the Province which can be supported and others which can be easily started which meet the needs identified in section 6.3. These can be initiated prior to the development of other plans or strategies.

1. *Creation of a marketing consortium of the "market-ready" culture and heritage organizations in the province.* There are many models in other tourism sectors (skiing, spas, guest ranches) of tourism operators who have recognised that individually they do not have the resources to market effectively. Collectively, they can position their product line in the international marketplace and identify BC as the destination of choice for that activity. In addition, the creation of such a consortium allows them to pool their marketing resources, lever government marketing resources and obtain other partnership investments.

2. *Develop the information resources required to assist "near market-ready" organizations to improve their marketability.* In many cases, organizations (many of which are small businesses) do not understand the desires and needs of visitors and consequently do not know how to develop their product or reach visitors with their marketing. The assembly or creation of this information and the means to reach organizations with it, is the first step to increasing the size and impact of the culture and heritage sector.

   In addition to market information, analysis should be undertaken to identify case studies of organizations or events that are successfully attracting a tourism market. In particular, analysis should include the identification of the stages of growth of the product or experience offered as well as the development of the organizational structure.

   There are numerous options for providing this information to culture, tourism and heritage groups including the Internet, provincial conferences, published material for distribution and regional workshops. Regional workshops are recommended as they offer the opportunity for more personal interaction and custom development of resource materials. In addition, the hosting of regional workshops for culture, heritage and tourism organizations will be the first step in developing the necessary regional linkages. As workshops will require the development of new material, implementation should be considered for spring/early summer of 2000.

3. *Tourism BC should assess the potential for marketing and partnership opportunities in the cultural tourism sector.* Tourism BC uses a thorough

Business Planning process to assess marketing and partnership opportunities. The first step in this process would be to examine the data and analysis found in this report, and to undertake further analysis of the BC Resident and Visitor Studies to examine the potential in different markets. This analysis would identify the product importance and market potential for cultural tourism. It could also include the development of market segments of the overall culture and heritage market in order to better understand the motivations for travel, trip destination selection, purchase behaviour and personal values. As this information is important for the proposed regional workshops, it should commence immediately.

Depending on the results of the analysis and the progress on other cultural tourism developments, Tourism BC should work to develop partnership opportunities with the cultural tourism sector as they currently do with other sectors of the tourism industry.

4. *Resources should be allocated to support the development of the Gold Rush Trail.* While work on a marketing plan for the Gold Rush Trail is currently underway by the Cariboo Region, this trail linking heritage sites between Fort Langley and Barkerville (and potentially on to Dawson City) will also require initial product development assistance. A working group of the major sites and communities should be developed to identify all of the resources available to "create" the Trail and to build on (or use) the marketing plan being developed by the region.

   While the key elements of the Trail are already in place, other supporting sites, activities and organizations will need to be developed to flesh out the travel experience. Implementation of marketing activity should not be planned until there is sufficient product available (and marketing support materials) to offer a high quality travel experience that is authentic, educational and entertaining.

   A working group is being developed within the region representing the major stakeholder interests. The Ministry of Small Business, Tourism and Culture should support this working group to the extent possible.

5. *An area-specific model of development should be undertaken to identify the steps and process of development.* The City of Kelowna has made considerable investment in developing the infrastructure necessary to create a culture and heritage district. However, there are other heritage resources in the Okanagan Valley that can be linked to Kelowna to create a larger mass of culture and heritage product that will have broader market appeal. These additional opportunities include the agri-tourism sector (largely wineries and the Wine Festival) and community museums, festivals and heritage sites in the immediate surrounding communities.

The nature and extent of the support required is uncertain at this time. As the major facilities will soon be in place and are being funded largely by the City of Kelowna, additional product development and marketing support to the region may be required.

6. *Examine the program model provided by the Ministry of Agriculture's "BC Product" program and adapt it to include arts, crafts and publications produced by BC residents in the Province.* There is considerable market demand for the purchase of authentic arts, crafts, handiwork and publications on the part of the culture and heritage segment. A program that guarantees the authenticity of the goods and is supported by additional promotion would assist with product sales. The program could be self supporting with registration fees paid by artisans and retailers once program materials and the necessary organization are in place. The BC Ministry of Agriculture's program would be a useful model. In addition, Visitor Information Centres around the province could assist with retail sales of local artisan's work on a commission basis.

   It is noted that development of a program similar to agriculture's "Buy BC" would be complicated, time-consuming and possibly expensive, but it may be worth exploring this model to determine whether the long-term benefits would warrant investment in such an initiative.

7. *The development of an electronic information and sales system should be explored.* Information technologies are available which would allow community and regional arts organizations to offer better information to tourists and residents alike. This could be based on a provincial website that is well promoted and linked to the Tourism BC website. Information on arts and heritage organizations could be selected in a variety of ways, with each organization having its own page. Where organizations already have their own website, hot links could provide direct access. In the longer term, organizations could offer ticket sales over this system.

8. *The Minister can encourage the discussion of issues and opportunities through provincial and regional Boards.* Provincial appointments to public boards in tourism, culture and heritage should encourage representation from each sector. Additionally, the Chairs of the Arts Council, the Heritage Trust and Tourism BC should meet on a periodic basis to discuss issues of mutual interest.

Appendix 1

International Long Haul Travel Cultural Market Characteristics: Japan, United Kingdom, Germany

Table 1.1. Summary Of Potential Long Haul Pleasure Culture Travel Markets

Market Indicator	Japan	U.K.	Germany
Approximate Adult Population (18 Years Or Over)	94,794,000 [1]	46,007,000 [2]	65,498,000 [3]
Incidence Of Long-Haul Pleasure Travelers	26.0% [1]	29.4% [2]	27.6% [3]
Potential Adult Long-Haul Pleasure Travelers	24,779,000 [1]	13,526,058 [2]	18,077, 448 [3]
Potential Culture Travelers [4]	45.2%	31.5%	40.9%
Estimated Culture Traveler Volume	11,200,108	4,260,708	7,393,676
Incidence of Culture Traveler (Interest) In Canada	69.1%	71.6%	26.8%
Estimated Culture Traveler (Interest) Volume In Canada	7,739,746	3,050,667	1,981,505
Incidence of Culture Traveler (Interest & Likelihood) Visiting Canada - Next Five Years	63.9%	79.0%	86.7%
Estimated Culture Traveler (Interest & Likelihood) Volume To Canada - Next Five Years	4,945,397	2,410,026	1,717,965

[1] Pleasure Travel Markets To North America. Japan. Final Report. 1995. Page iii.

[2] Pleasure Travel Markets To North America. United Kingdom. Travel Trade Report. 1996. Page 85.

[3] Pleasure Travel Markets To North America. Germany. Travel Trade Report. 1996. Page 82.

[4] Museums and art galleries or arts and cultural attractions (e.g. live theatre, concerts, dance, opera, ballet) or local crafts and handiwork/festivals or historical or archaeological buildings and places are always important to you when selecting a holiday destination (long-haul).

Table 1.2. Potential Culture Long-Haul Travel Market Socio-Demographic Characteristics (Most Frequent Responses)

Characteristic	Market Origin Japan	U.K.	Germany
Friends/Relatives Living In Canada	No (85.2%)	No (60.2%)	No (94.4%)
Friends/Relatives Living In The U.S.	No (73.9%)	No (59.2%)	No (82.7%)
Household Members < 18	None (69.3%)	None (67.5%)	None (77.2%)
Household Members 18+	Two (34.7%)	Two (52.5%)	Two (55.4%)
Gender	Female (53.3%)	Female (50.6%)	Female (55.1%)
Marital Status	Married (65.2%)	Married (58.3%)	Married (49.6%)
Age Grouping	45 - 54 years (23.2%)	35 - 44 years (23.7%)	35 - 44 years (20.4%) / 45 - 54 years (20.4%)
Education Level	College/university graduate (35.0%)	CSE/Standard Grades/O Grades/ O Levels/ Lowers (25.1%)	Middle school (26.8%)
Occupation	Unemployed/non-working housewife/retired (21.3%)	White collar worker (28.3%)	White collar worker (32.7%)
Domestic Circumstances	Live with my spouse (57.1%)	A family with children still living at home (34.1%)	Live with spouse/partner with no children (29.4%)
Household Income Contributors	One person (52.8%)	Two (47.1%)	Two (51.0%)
Average Annual Income	7.0 - 9.9 million Yen (22.5%)	£25,001 - £30,000 (16.2%)	DM 4,501 or over (37.0%) per month
English Proficiency			
Read	18.6%	n/a	61.4%
Write	11.9%	n/a	51.0%
Speak	10.9%	n/a	61.3%
French Proficiency			
Read	2.0%	27.1%	17.8%
Write	0.9%	20.3%	14.0%
Speak	1.2%	27.6%	17.6%
Credit Card	Visa (74.5%)	Visa (84.8%)	Eurocard (73.5%)

Table 1.3. Potential Culture Long-Haul Travel Market General Travel Motivations (Top 10 Travel Motivations By Rank)

Japan	U.K.	Germany
• Outstanding scenery	⇒ Opportunity to increase one's knowledge about places, people and things	♦ Opportunity to increase one's knowledge about places, people and things
• Historical or archaeological buildings and places	⇒ Personal safety, even when traveling alone	♦ Outstanding scenery
• Opportunity to increase one's knowledge	⇒ Variety of things to see and do	♦ Personal safety, even when traveling alone
• Variety of things to see and do	⇒ Interesting and friendly local people	♦ Variety of things to see and do
• Destinations that provide value for my holiday money	⇒ Standards of hygiene and cleanliness	♦ Interesting and friendly local people
• Nice weather	⇒ Destination that provides value for my holiday money	♦ Destination that provides value for my holiday money
• Comprehensive pre-trip/in-country tourist info. availability	⇒ Good public transportation (e.g. airlines, local transit systems)	♦ Local cuisine/new foods
• Standards of hygiene and cleanliness	⇒ Nice weather	♦ Comprehensive pre-trip/in-country tourist info. availability
• Environmental quality of air, water and soil	⇒ Historical or archaeological buildings and places	♦ Nice weather
• Good public transportation (e.g. airlines, local transit systems)	⇒ Outstanding scenery	♦ Environmental quality of area

Appendix 2

Domestic Cultural Tourism Market Characteristics

Table 2.1. Estimated Domestic Culture Travel Market Size

Market Indicator	Canada
Overnight Pleasure Travelers [1]	16,225,000
Potential Culture Travelers [2]	25.1%
Estimated Culture Traveler Volume	4,072,475
Incidence of Culture Traveler (Interest) In The Next 2 Years	90.9%
Estimated Culture Traveler (Interest) Volume In The Next 2 Years	3,701,880
Incidence of Culture Traveler (Interest & Likelihood) - Next Two Years	46.7%
Estimated Culture Traveler (Interest & Likelihood) - Next Two Years	1,728,778

[1] Domestic Tourism Market Research Study. Canada. Main Report. 1996. Page i.

[2] Museums and art galleries, arts and cultural attractions (e.g. live theatre, concerts, dance, opera, festivals) and historical places or buildings are often or always important to you, personally, when deciding on a destination for vacation, recreation or holiday.

Table 2.2. Potential Cultural Domestic Travel Market Socio-Demographic Characteristics -Most Frequent Responses

Characteristic	Canada
Household Members < 18	None (68.5%)
Household Members 18–	Two (54.0%)
Gender	Female (52.9%)
Marital Status	Married/living with someone (56.0%)
Age Grouping	65 and older (22.4%)
Education Level	Graduated from high school (26.2%)
Occupation	Retired (25.5%)
Household Income Contributors	Two (49.4%)
Average Annual Income	$20,001 to $30,000 (19.9%)

Table 2.3. Top 10 Potential Domestic Cultural Travel Market Travel Motivations In Order of Decreasing Importance

Canada
* Standards of hygiene and cleanliness
* Opportunity to increase one's knowledge
* Destination that provides value for my holiday money
* Variety of things to see and do
* Nice weather
* Personal safety, even when traveling alone
* Interesting and friendly local people
* Historical places or buildings
* Outstanding scenery
* Having fun, being entertained

Appendix 3

B.C. Non-Resident Cultural Travel Market Characteristics

Table 3.1. Estimated Non-Resident Cultural Travel Market Size, 1996.

Market Indicator	BC Non-Residents
Non-Resident Volume During Study Period (October 1995 - November 1996)	11,946,000
Potential Culture Travelers [1]	51.2%
Estimated Culture Traveler Volume	6,116,352
Future Intentions (For Travel Within BC):	
Within the next 12 months (41.6%)	2,544,402
Within one to two years (29.0%)	1,773,742
More than two years from now (17.0%)	1,039,780
Not planning to travel within BC (12.4%)	758,428

[1] Visiting historic sites or areas or visiting attractions such as museums, art galleries, zoos, etc. were somewhat or very important to your household when choosing to take this trip to BC.

Table 3.2. Summary of BC Resident/Non-Resident Cultural Travel Market Socio-Demographic Characteristics 1996

Characteristic	BC Residents	Non-Residents
Gender	Female (52.1%)	Female (55.5%)
Age Grouping	35 - 44 years (22.8%)	35 - 44 years (25.6%)
Education Level	Completed high school (31.4%)	College/university degree (27.2
Occupation	Employed full-time (40.8%)	Employed full-time (42.4%)
Total Annual Household Income (before taxes)	$40,000 to under $60,000 (28.8%)	$100,000 or over (24.8%)

Table 3.3 Summary of BC Resident/Non-Resident Cultural Travel Market Motivations, 1996

Residents	Non-Residents
♦ Visiting a place that takes good care of its environment	✧ Viewing scenic areas
♦ Resting and relaxing	✧ Travelling to places where I feel safe and secure
♦ Getting value for the cost of the trip	✧ Going to places with friendly and hospitable people

♦ Visiting historic sites or areas or attractions such as museums, art galleries	✧ Visit a place that takes good care of its environment
♦ Learning new things, increasing my knowledge	✧ Having a variety of things to see and do
♦ Being physically active	✧ Visiting clean cities and towns
♦ Going to a place that is good for the family	✧ Getting value for the cost of the trip
♦ Participating in outdoor activities	✧ Learning new things, increasing my knowledge
♦ Viewing wildlife and birds	✧ Resting and relaxing
♦ Experiencing and seeing a mountain area	✧ Experiencing and seeing a mountain area

Appendix 4

B.C. Resident Cultural Travel Market Characteristics

Table 4.1 Estimated BC Resident Cultural Travel Market Size, 1996

Market Indicator	BC Residents
Resident Volume During Study Period (April 1995 - March 1996)	18,656,000
Potential Culture Travelers [1]	27.6%
Estimated Culture Traveler Volume	5,149,056
Future Intentions (For Travel Within BC):	
Within the next 12 months (84.5%)	4,350,952
Within one to two years (6.9%)	355,285
More than two years from now (0.2%)	10,298
Not planning to travel within BC (8.4%)	432,521

[1] Visiting historic sites or areas or attractions such as museums, art galleries were somewhat or very important to you or your household in choosing to take this trip within BC.

4.2.1.1 Being more specific, please tell me the main activity on your leisure trip within BC?

Activity	% of Responses
City/town sightseeing	3.7
Outdoor/wilderness activities	16.9
Attending arts/cultural events/facilities	3.3
Attending fairs/festivals	0.6
Participating in or attending sports events	5.2
Shopping	11.7
General sightseeing	12.2
Visiting friends and relatives	33.2
Personal matters (medical, personal business) general business	3.6
Business conferences/convention/trade shows/seminars	0.7
Travelling to a destination outside of B.C.	0.2
Stop over/passing through	0.8
Vacation (general)	1.8
A meal/drinking	0.4
Honeymoon	0.0
Rest/relaxation	4.5
Church convention/activities	0.1
Cruise/boating	0.3
Nightlife/entertainment	0.3
Driving/just went for a drive	0.4
Other	0.1

Section 2: Trip Planning

4.2 1What sources of information did you use before or during your trip? This could include sources such as motor clubs, travel service companies, printed material, government tourism organizations, information centres or 1-800 numbers?

Information Source	Percent of Respondents
Brochures, pamphlets	15.4
1-800 numbers (toll free for business in BC)	3.4
Tourism BC 1-800 number	1.8
Travel information centres	5.2
BC Tourism associations or bureau	4.0
National/ Provincial park info centre	0.6
Specific tourism businesses in BC (such as hotels, fishing lodges and tour companies)	1.0
Travel agent	2.4
Friends or relatives	12.9
Airline company	0.3
Tour operation or company	0.2
Articles, features in newspapers or magazines	3.9
Movies, TV shows	0.9
Books, library	4.0
Map	8.7
Automobile association	6.3
Embassy, consulate	0.1
Clubs, associations	1.3
Advertisements in newspapers or magazine	2.7
Advertisements in television	0.9
Advertisements in mail	0.1
Travel or sport show	0.0
Previous visits/personal knowledge	0.2
BC Ferries/ferry schedules	3.4
Word of mouth	0.6
Bed & Breakfast Association	0.2
Company decision/business contacts	0.2
Yellow Pages/telephone book	2.2
Radio (broadcast, advertising, etc)	1.3
Weather forecast	1.1
Government organization/department	0.8
The internet	0.9
Contacted event/activity organizer	0.3
Bus tours/schedule	0.3
#1-800 for road conditions/highways	0.1
BC accommodation guide	1.0

BCAA	0.3
CAA	0.0
Chamber of Commerce	0.4
Nothing	42.1
Other	2.7

4.2.3 Choosing BC As A Destination

4.2.3.In general, how important were each of the following to you or your household in choosing to take this trip within BC? Please tell me if that was not at all, not very, somewhat or very important?

4.2.3.1. Visiting historic sites or areas or attractions such as museums, art galleries

Importance Rating	**Percent of Respondents**
Very important	40.5
Somewhat important	59.5

4.2.3.2 Learning about Native (Indian) culture and art

Importance Rating	**Percent of Respondents**
Very important	18.4
Somewhat important	33.2
Not very important	7.2
Not at all important	41.2

4.2.4 Trip Details

4.2.4.1 Including yourself, how many people were in your immediate travel party*?

Travel Party Size	**Percent of Respondents**
1	10.1
2	39.2
3	18.2
4	17.2
5	8.0
6+	7.2

* defined as people that the respondent knew prior to the trip, planned to take the trip with and travelled with.

4.2.4.2 Was your main destination within B.C. or outside of B.C.?

Main Destination	Percent of Respondents
Within B.C.	95.9
Outside of B.C.	4.1

4.2.4.3 What was the main destination on this trip?

Main Destination	Percent of Respondents
Vancouver Island	35.9
Vancouver Coast and Mountains	26.1
Southern Thompson Okanagan	8.7
West BC Rockies	5.0
Northern Thompson Okanagan	8.3
Cariboo	3.6
Northwest	7.9
Northeast	1.6
East BC Rockies	2.9

4.2.4.4 Did you or anyone in your household:

Activity	Percent of Respondents
Go sightseeing	68.1
Go shopping	63.4
Dine out in restaurants	78.5
Do photography	49.7
Participate in nightlife	23.9
Visit friends and relatives	60.5
Go horseback riding	2.9
Go an winery or farm tours	4.6
Attend local festivals, concerts, and fairs	16.1
Visit historic sites	42.9
Visit art galleries and museums	35.7
Visit Native (Indian) cultural sites	19.5
Visit zoos, natural displays, gardens	23.5
Visit national and provincial parks	37.2
Go fishing	11.9
Go golfing	7.5
Go hiking or backpacking	35.8
Do wildlife viewing	38.4

Go kayaking, canoeing, rafting	7.0
Go boating	11.0
Go cross country skiing	0.8
Go downhill skiing or snowboarding	4.0
Go bicycling	10.2

4.2.4.5 What additional activities were pursued?

Activity	Percent of Respondents
Sporting events	10.2
Amusement or theme parks	3.2
Swimming	23.9
Whalewatching	1.5
Casual walking	14
Camping	1.7
Exploring backcountry wilderness	0.8
Snowmobiling	4.7
Visit/explore mountains	0.8
Gardening	0.6
Sporting activity (running, jogging, soccer, etc.)	31.7
Business meetings/work activities	5.9
Wedding	1.9
Resting/relaxing	3.4
Went to beach	2.3
Church activities	0.5
Miscellaneous personal event	3.2
Other	3.7

4.2.4.6 Earlier you mentioned that the following items were very important to you in your decision to travel within BC. Now we would like to know how satisfied you were with each of these items while you were travelling within BC. [only asked of those items that were identified as somewhat or very important from Section 3].

4.2.4.6.1 Visiting historic sites or areas or attractions such as museums, art galleries

Satisfaction Level	**Percent of Respondents**
Very satisfied	60.2
Somewhat satisfied	32.0
Not very satisfied	4.3
Not at all satisfied	3.5

4.2.4.6.2 Learning about Native (Indian) culture and art

Satisfaction Level	Percent of Respondents
Very satisfied	34.1
Somewhat satisfied	47.4
Not very satisfied	12.0
Not at all satisfied	6.4

Section 5: Past Travel and Future Intentions (For Travel Within B.C.)

4.2.5.1 Including this trip, in the past year, approximately how many overnight trips in total, of at least 80 km one way from your home, have you taken for leisure which included time spent travelling within B.C.?

Overnight Trips (Leisure)	Percent of Respondents
None	7.4
1	9.1
2	9.0
3	14.8
4	13.5
5-9	23.3
10+	22.9

4.2.5.2 In the past year, approximately how many overnight trips in total, of at least 80 km one way from your home, have you taken for business which included time spent travelling within B.C.?

Overnight Trips (Business)	Percent of Respondents
None	69.7
1	7.1
2	8.1
3	3.9
4	2.5
5-9	5.1
10+	3.5

4.2.5.3 Now think about your future travel plans. are you planning to go on a leisure trip which will include time spent travelling within BC

Time Frame	Percent of Respondents
Within the next 12 months	84.5
Within one to two years	6.9
More than two years from now	0.2
Or you are not planning to travel within BC	8.4

Section 6: Demographics

4.2.6.1 Including yourself, how many adults, 18 years and older, currently reside in your household?

Number of Adults	Percent of Respondents
1	12.3
2	55.2
3	20.7
4	8.8
5+	3.1

4.2.6.2 How many children (under 18) currently reside in your household?

Number of Children	Percent of Respondents
None	59.2
1	14.4
2	18.2
3	5.4
4	2.5
5+	0.5

4.2.6.3 Gender:

Gender	Percent of Respondents
Male	47.9
Female	52.1

4.2.6.4 Which of the following categories best describes the total annual income, before taxes, of all members of your household?

Total Annual Income	Percent of Respondents
Under $20,000	9.6
$20,000 to under $40,000	24.6
$40,000 to under $60,000	28.8
$60,000 to under $80,000	20.5
$80,000 to under $100,000	7.3
$100,000 or over	9.1

Appendix 5

Market Comparisons of Cultural Tourism Market Potential

5.4 Most Recent Trip Travel Market Activity Profiles

5.4.1 Japanese Long Haul Pleasure Travel Study: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Enjoying ethnic culture/events	52.2
Visiting museums/galleries	42.9
Visiting place with religious significance	34.7
Local crafts and handiwork	33.4
Visiting places of historical interest	32.5
Arts & cultural attractions	19.7
Visiting places of archaeological interest	15.2
Visiting sites commemorating important people	13.6
Attending local festivals/fairs/other special events	11.0
Outdoor Activities	
Sunbathing or other beach activities	33.5
Swimming	25.1
Visits to appreciate natural ecological sites	11.8
Observing wildlife/bird watching	11.7
Diving (snorkeling or scuba)	10.3
Outdoors activities such as climbing, hiking, etc.	7.1
White water rafting	4.3
Playing tennis	4.3
Water sports (e.g. water skiing, sailing, canoe)	3.7
Fishing	2.9
Bicycle riding (touring, mountain hiking, day trips)	2.6
Horse-riding	2.2
Visiting places where you can experience life on a ranch	2.0
Stay in campgrounds or trailer parks	1.9
Surfing	1.5
Hunting	0.2
Alpine Skiing	
Alpine skiing (downhill)	2.9
Golfing	
Golfing	12.0

5.4.2 UK Long Haul Pleasure Travel Study: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Local crafts and handiwork	59.3
Enjoying ethnic culture/events (e.g. festivals, music, neighborhoods, food)	53.5
Visiting places of historical interest	50.6
Visiting museums/galleries	45.2
Attending local festivals/fairs/other special events	38.1
Visiting place with religious significance (e.g. churches, temples)	32.0
Arts & cultural attractions (e.g. live theatre, concerts, dance, opera, ballet)	29.8
Visiting sites commemorating important people	27.1
Visiting places of archaeological interest	24.8
Visiting historical military sites (e.g. battlefields)	17.2
Outdoor Activities	
Swimming	70.6
Sunbathing or other beach activities	56.3
Observing wildlife/bird watching	42.0
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	41.9
Water sports (e.g. water skiing, sailing, canoeing)	20.8
Walking tours	18.7
Diving (snorkeling or scuba)/Surfing	17.7
Outdoors activities such as climbing, hiking, etc.	16.3
Bicycle riding (touring, mountain, day trips)	11.5
Staying in campgrounds or trailer parks	7.7
Horse-riding	5.8
Hunting/Fishing	5.4
White water rafting	4.3
Motorcycling	2.9
Visiting places where you can experience life on a ranch	2.8
Alpine Skiing	
Alpine skiing (downhill)	2.3
Golfing	
Golfing/Tennis	11.7

5.4.3 German Long Haul Pleasure Travel Study: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Enjoying ethnic culture/events (e.g. festivals, music, neighborhoods, food)	61.4
Local crafts and handiwork	58.2
Arts & cultural attractions (e.g. live theatre, concerts, dance, opera, ballet)	48.8
Visiting museums/galleries	47.4
Visiting place with religious significance (e.g. churches, temples)	36.9
Visiting places of historical interest	34.1
Attending local festivals/fairs/other special events	34.0
Visiting sites commemorating important people	15.3
Visiting historical military sites (e.g. battlefields)	5.9
Outdoor Activities	
Swimming	66.3
Sunbathing or other beach activities	61.4
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	59.6
Observing wildlife/bird watching	49.8
Outdoors activities such as climbing, hiking, etc.	24.1
Water sports (e.g. water skiing, sailing, canoeing)	24.1
Diving (snorkeling or scuba)/Surfing	21.4
Walking tours	17.0
Bicycle riding (touring, mountain, day trips)	12.5
Staying in campgrounds or trailer parks	8.0
Visiting places where you can experience life on a ranch	7.4
Motorcycling	7.3
Horse-riding	4.3
Hunting/Fishing	3.8
White water rafting	3.6
Alpine Skiing	
Alpine skiing (downhill)	1.4
Golfing	
Golfing/Tennis	14.1

5.4.4 Domestic (Canada) Pleasure Travel Study: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Enjoying ethnic culture/events (e.g. festivals, music, neighborhoods, food)	23.8
Local crafts and handiwork	21.3
Visiting places with religious significance (e.g. churches, temples)	14.6
Visiting sites commemorating important people	10.1
Visiting places of archaeological interest	8.1
Visiting places of military significance	6.1
Outdoor Activities	
Sunbathing or other beach activities	31.4
Visits to appreciate natural ecological sites like forests, wetlands, or animal reserves	22.5
Outdoors activities such as climbing, etc.	18.8
Water sports (e.g. water skiing, sailing, canoeing)	12.9
Staying in campgrounds or trailer parks	9.9
Horse-riding	4.5
Playing tennis	4.1
Visiting places where you can experience life on a ranch	3.9
Diving (snorkeling or scuba)	3.3
Snowmobiling	2.8
White water rafting	1.3
Surfing	1.1

5.4.5 BC Visitor Study - Non-Residents: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Art galleries/ museums/ exhibit	19.1
Concerts/ live theatre	5.5
Historic sites	4.7
Local festivals/ fairs/ events	4.2
Outdoor Activities	
Hiking/backpacking	13.0
Swimming	10.6
Lake boating (sail/ power)	5.1
Freshwater fishing	3.6
River canoeing/ kayaking/ rafting	3.6
Wineries/ farm tours/ etc	3.6
Ocean boating (sail/ power)	2.9
Bicycling	2.6
Whalewhatching	2.0
Camping	1.9
Horseback riding	1.8
Saltwater fishing	1.7
Wildlife viewing/ bird watching	1.6
Exploring backcountry wilderness	0.7
Ocean kayaking/ canoeing	0.4
Hunting	0.4
Snowmobiling	0.4
Scuba diving	0.1
Lake houseboating	0.1
Alpine Skiing	
Downhill skiing/ snowboarding	8.5
Golfing	
Golfing	7.4

5.4.6 BC Visitor Study - Residents: Activity Participation (most recent trip)

Activity	% of Respondents
Cultural Activities	
Visit historic sites	15.5
Visit art galleries & museums	11.4
Attend local festivals, concerts, and fairs	9.2
Outdoor Activities	
Do wildlife viewing	27.6
Go hiking or backpacking	20.5
Go fishing	9.1
Go boating	7.4
Go bicycling	5.9
Go kayaking, canoeing, rafting	3.6
Go on winery or farm tours	2.1
Go horseback riding	1.6
Alpine Skiing	
Go downhill skiing or snowboarding	3.9
Golfing	
Go golfing	5.6

APPENDIX 6

LIST OF SOURCES FOR CULTURAL TOURISM INVENTORY MATRIX

Archives Association of British Columbia. 1999. A Guide to Archival Repositories in British Columbia. **Website found at: http://aabc.bc.ca/aabc/bcarch.html.**

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